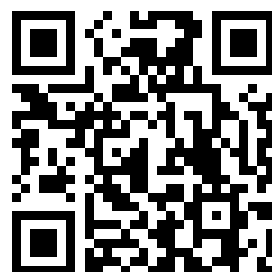

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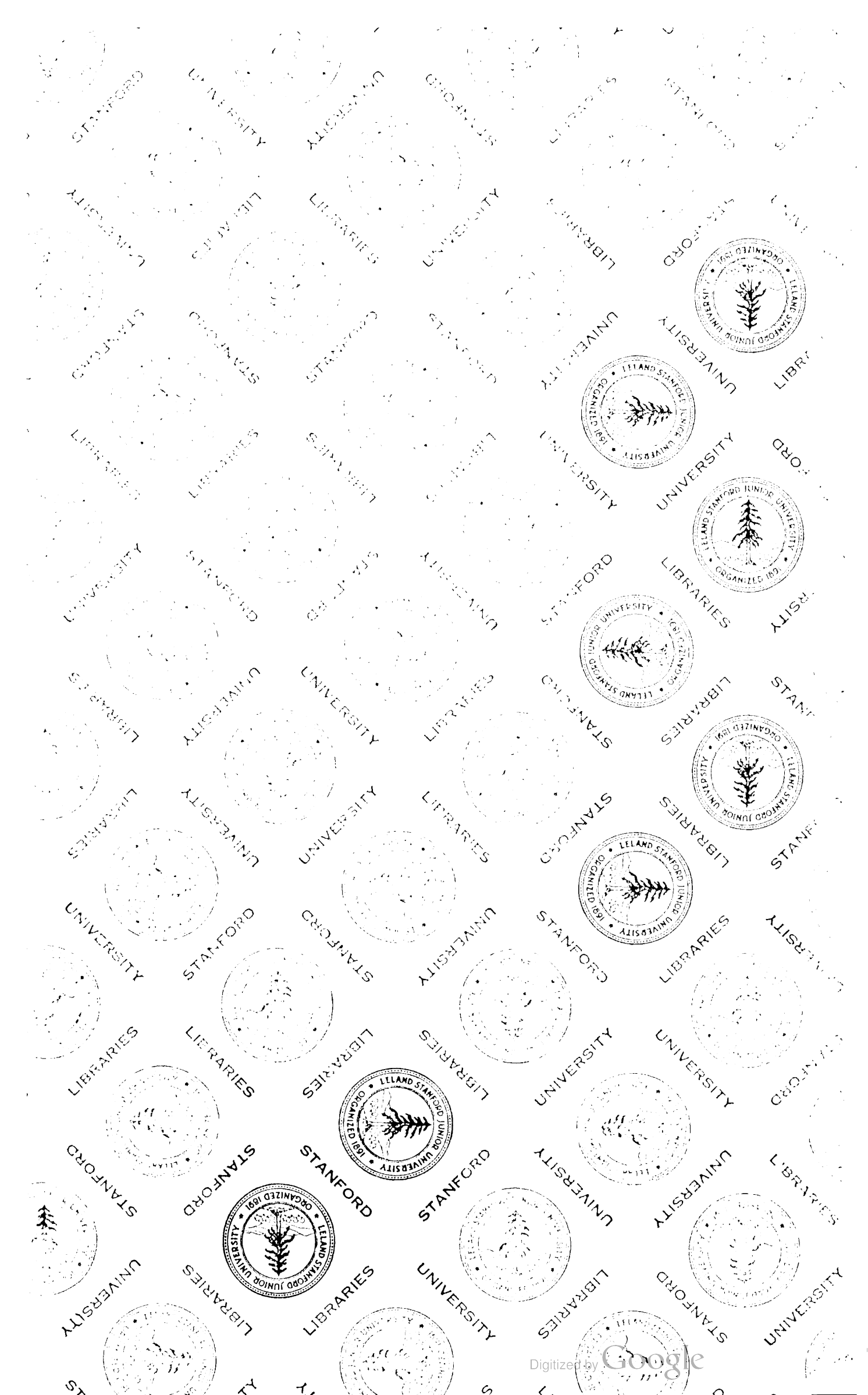


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AN ECONOMIC SURVEY OF THE COLONIAL EMPIRE (1933)

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LONDON

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PREFACE.

The present publication, which is a revised version of the first edition of this work published last year, is an attempt to assemble within a single volume all the essential facts relating to the economic situation of the Colonial Empire, that is of the non-self-governing Colonies, the Dependencies of certain of those Colonies, the Protectorates, the Protected States in Malaya and Borneo, and the Mandated Territories administered under the authority of His Majesty's Government in the United Kingdom. The territories of the South Africa High Commission, which were not included in the first edition, have been included in the present issue. The word "Dependency" is used throughout the volume not in the restricted sense of "a Dependency of a Colony" but in the widest sense as meaning any one of the units set out above.

The information contained herein has been collected from a number of sources, Colonial Blue Books, Colonial Annual Reports, other official reports of Colonial Governments, publications of the Imperial Institute, the Imperial Economic Committee, and the Empire Marketing Board, and other sources, official and unofficial, both published and unpublished. The whole work has been completely revised and a substantial amount of new matter has been inserted.

The work is divided into two Parts.

The first Part contains a series of memoranda on the economic situation of the individual Dependencies.

An endeavour has been made to prepare these memoranda on exactly uniform lines, so that the same essential facts may be given for each Dependency. Each memorandum is divided into ten Sections.

The first Section gives the geographical position and area of the Dependency, the salient facts regarding its climate and a brief account of the ownership of the land of the Dependency and the uses to which it is put.

The Second Section gives the total population of the Dependency, the racial distribution and principal occupations of the inhabitants, so far as they are known, and the salient facts regarding immigration and emigration, if they are of importance in the economic life of the Dependency.

The third Section relates to finance and is divided into two sub-sections. The first gives a brief account of the currency system of the Dependency, a list of the banks doing business therein, and an account of work of a banking nature performed by the Government, if any. The second sub-section relates to public finance. It gives (a) a brief statement of the Public Debt of the Dependency, (b) an analysis of the Revenue of the Dependency for the latest year for which figures are available, showing the proportion of the Revenue derived from various sources, (c) an analysis of the Revenue derived from Customs showing, where the information is available, the proportion of the Revenue derived from imports from various countries, (d) an analysis of the Expenditure of the Dependency for the latest year for which figures are available classified under the following general heads:—

1. Deficit on the operations of self-balancing Departments, such as the Post Office, Government Railways, etc., if any.
2. Public Debt Service.
3. Administration.
4. Economic Development.
5. Social Services.
6. Defence.
7. Non-effective (Pensions and Gratuities).

(This basis of classification has been adopted to give a comparative view of the objects of Government expenditure in the various Dependencies, but the exact division between "Administration," "Economic Development" and "Social Services" is inevitably somewhat arbitrary.)

(e) A statement of the Reserve Funds of the Dependency, if any, (f) a statement of the financial assistance granted to the Dependency by His Majesty's Government in recent years either by direct grant or loan-in-aid or by grant or loan from the Colonial Development and Empire Marketing Funds.

The fourth Section is devoted to trade statistics and gives (a) the total value of the exports from and imports into the Dependency in the years 1913, 1930, 1931, 1932 and 1933, (b) an analysis of the exports and imports for 1933 according to countries of destination and origin, and (c) a list of the principal exports and imports with quantities and values and the values for the principal countries of destination and origin. Imports and exports have been divided into the four Classes, which are used in the published statistics of the United Kingdom, viz:—

Class I.—Food, drink, and tobacco.

Class II.—Raw materials and articles mainly unmanufactured.

Class III.—Articles wholly or mainly manufactured.

Class IV.—Animals, not for food, and parcel post (Class V in the United Kingdom returns).

The fifth Section gives an account of the natural resources of the Dependency divided into six heads:—1. Agriculture, 2. Forestry, 3. Animal Husbandry, 4. Minerals, 5. Fisheries, 6. Miscellaneous, and an estimate of the extent to which the Dependency is self-supporting in foodstuffs.

The sixth Section gives an account of the industrial activities of the Dependency, if any.

The seventh Section gives an estimate of the importance of other economic activities, such as entrepôt trade and tourist traffic, in the economic life of the Dependency.

The eighth Section gives an account of the internal road, rail, and water communications of the Dependency, its overseas steamship communications, the amount of shipping entered at the ports of the Dependency and the port facilities.

The ninth Section gives a brief account of the Tariff of the Dependency stating whether a system of Imperial Preference is in force. (Details of the tariffs in force as notified up to July, 1934, are contained in the Non-Parliamentary Publication, "The Customs Tariffs of the Colonial Empire" (Colonial No. 97—1, 2 and 3), published by His Majesty's Stationery Office. Amending leaflets are issued from time to time.)

The tenth Section states whether the Dependency maintains Trade Representatives in the United Kingdom or elsewhere.

The second Part contains a series of memoranda on the products of the Colonial Empire, both those which are produced for export and those which are produced only for internal consumption.

It has proved impossible to devise any common form for these memoranda; there is a great difference between the importance of the various products and there are special features in certain cases to which attention must be drawn. In the case of the more important export products, however, the memoranda endeavour to give an account of the product, the manner in which it is produced and prepared for the market, the recognized grades into which it is divided for marketing purposes, the total annual production and the countries where it is produced, the principal consuming countries, and the salient facts about its production in the Colonial Empire. In the case of the principal export products the memoranda are accompanied by tables showing total exports from the Colonial Empire during the years 1930, 1931, 1932, and 1933.

The memoranda in Part I of the volume are new versions of the memoranda in the first edition completely revised both in the Colonial Office and in the Dependencies themselves. The memoranda in Part II have been revised in the Colonial Office with the assistance of those gentlemen whose names were set out in the preface to the first edition, and to whom renewed thanks are due.

It had been hoped that the present volume would be published at a very much earlier date, but unforeseen difficulties have caused a serious delay in publication. In these circumstances advantage has been taken of the delay to insert a number of later figures in the memoranda in Part II although the principal figures in Part I and the Tables do not come down beyond 1933.

In order that the statistics may in future be published at a date nearer to the period to which they relate, it is proposed that the next edition should contain the statistics for 1934 and 1935, and should appear before the end of 1936.

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PART I.—THE ECONOMIC SITUATION OF THE INDIVIDUAL DEPENDENCIES

EAST AFRICA

KENYA.

I.—Situation, etc.

The Colony and Protectorate of Kenya extends roughly speaking from latitude 4° N. to latitude 4° S. and from longitude 34° E. to longitude 41° E. It is bounded on the north by Abyssinia and the Sudan, on the west by Uganda, and the south by Tanganyika Territory and on the east by the Indian Ocean and Italian Somaliland. It includes parts of the great African lakes; the land area is 219,730 square miles and the water area 5,230 square miles, making a total of 224,960 square miles. The greater part of the territory is within the Colony, the Protectorate being only a strip of land 10 miles deep along the coast.

In this memorandum the word "Colony" is used to describe the whole territory and not only the Colony proper.

The northern part of the Colony, comprising three-fifths of the whole, is arid and comparatively waterless. The southern strip, in which almost all economic production is centred, comprises a low-lying coastal area and a plateau raised by volcanic action to a height varying from 3,000 feet to 10,000 feet. This latter productive area includes Mount Kenya (17,040 feet), Mount Elgon (about 14,000 feet), the Aberdare Range (about 12,000 feet to 13,000 feet) and part of the Great Rift Valley which is some 30 to 40 miles wide and often 2,000 feet to 3,000 feet lower than the country bounding it on either side. The land in this southern strip is traversed by the Kenya and Uganda Railway and is divided principally between Native Reserves and alienated land, i.e., European estates; most of the latter lie some considerable distance from the coast.

Of the total area of 140,627,200 acres of land surface only 6,718,080 acres are alienated. There are, in addition, 981,760 acres which have been surveyed into farms and are available for alienation. The remaining 132,927,360 acres may be described as follows:—

	<i>Acres.</i>
Native Reserves	30,940,800
Forest Reserves	2,746,240
Government Reserves (outspans, quarantine areas, etc.)	138,240
Township and Township Reserves	218,880
Northern Frontier Province, Turkana, and extension from Uganda	76,899,840
Areas still unclassified	21,983,360
	132,927,360

The recommendations of the Kenya Land Commission Report have not yet been implemented. If carried out in full the effect will be to increase the areas of Native Lands by approximately 1,682,560 acres, making a total of 32,623,360, chiefly at the expense of "Forest Reserves" and "Areas still unclassified".

The area of Native Reserves occupied by Pastoral Tribes is approximately 12,963,200 acres and that occupied by Agricultural Tribes 17,977,600. The areas occupied by tribes which are partly pastoral and partly agricultural have been included in the agricultural group. To the pastoral group should be added the areas of Turkana, Northern Frontier Province and extension from Uganda—a total of 76,899,840 acres.

Climatic conditions vary very greatly between different parts of the Colony. The mean shade temperature varies from 58° to 65° F. in the highland areas to 80° F. in the coastal districts.

The rainfall varies from about 10 inches per annum in the arid northern districts to an average of 36 inches in the vicinity of Victoria Nyanza. In the main agricultural areas, the average rainfall varies from 30 to 60 inches. Generally speaking, in the productive areas east of the Rift Valley the rainfall is distributed in two short rainy seasons between the end of March and end of May, and again between the end of October and middle of December, so that annual crops are dependent on one or other of these rains (20 inches or 15 inches each) and cannot make use of both, whereas in and west of the Rift Valley there is also a considerable rainfall in July and August.

The following are the most significant figures for 1933 recorded at the stations shown:—

<i>Station.</i>	<i>Height above sea level.</i>	<i>Absolute maximum.</i>	<i>Mean maximum.</i>	<i>Mean minimum.</i>	<i>Absolute minimum.</i>	<i>Rainfall 1933.</i>	<i>Average over a period of years.</i>	<i>Number of years.</i>
	<i>Feet.</i>	<i>° F.</i>	<i>° F.</i>	<i>° F.</i>	<i>° F.</i>	<i>Inches.</i>	<i>Inches.</i>	
*Mombasa	75	96.0	87.2	74.8	68.5	40.62	46.56	43
*Kabete	6,004	82.2	73.8	53.8	44.0	24.43	43.01	5
*Machakos	5,400	93.0	82.8	53.8	47.0	32.90	36.87	39
*Limuru	7,400	80.0	69.7	48.0	40.0	37.33	54.20	27
Nakuru	6,070	90.0	79.6	49.6	40.0	27.64	36.70	25
Eldoret	6,800	84.0	76.4	50.3	42.0	30.31	42.98	3
Kitale	6,200	88.7	78.2	53.6	44.0	39.47	45.31	13
Kericho	6,700	89.0	79.3	48.3	40.0	55.77	72.42	21
Molo	8,500	—	—	—	—	43.60	53.38	23
Kisumu	3,731	92.0	83.4	63.9	58.0	40.92	45.05	30

* East of Rift Valley (with two rainy seasons).

II.—Population, etc.

No accurate census of the native population has yet been made, and the basis on which estimates are framed admits a fairly wide margin of error. On this basis the native population was estimated in 1933 at 3,017,117.

The following table shows the number of non-natives in the Colony at the census of March, 1931, and the estimated number at the end of 1933:—

	March, 1931.	December, 1933.
Europeans	16,812	17,106
British Indians	39,644	33,950
Goans	3,979	3,310
Arabs	12,166	11,853
Others	1,346	1,385
	<u>73,947</u>	<u>67,604</u>

If fluctuations due to immigration and emigration be disregarded, the tendency of all sections of the population is to increase.

The occupations of Europeans and other non-natives were classified as follows in the 1931 census:—

	Europeans.	Other non-natives.
Agriculture	2,522	640
Industry	991	6,446
Commerce	2,168	14,338
Government and Municipal	1,735	2,972
Professional	1,124	264
Personal or domestic	343	1,452
Retired, married women, and children ...	2,215	11,383
Others	5,714	19,640
	<u>16,812</u>	<u>57,135</u>

Only very imperfect statistics relating to the occupations of the native population are kept. The following table shows the approximate number of natives in *paid employment* in 1933:—

Government employment:—	1933.
Railways and Harbours	12,000
Defence	1,500
Other Departments	10,000
Municipalities	1,400
Agriculture	81,000
Domestic Service	15,000
Other:—	
Mines	9,600
Building trade, Missions, in townships, etc. ...	10,585
	<u>141,085</u>

It may be assumed that the rest of the native population are principally occupied in agriculture and animal husbandry.

III.—Finance.

A. CURRENCY AND BANKING.

1. The unit of currency in Kenya is the East African shilling, divided into 100 cents. The coins in circulation are 1 shilling and 50 cents (silver), 10 cents, 5 cents, and 1 cent (nickel).

Notes are in circulation of the following denominations Shs. 5, 10, 20, 100, 200, 1,000, and 10,000.

The notes and coinage are issued by the East African Currency Board and the exchange value of the currency is maintained at a parity with sterling by the operations of that Board.

2. Three British banks maintain branches in the territory, namely:—

The National Bank of India, Ltd., at Mombasa, Nairobi, Nakuru, Kisumu, Eldoret.

The Standard Bank of South Africa, Ltd., at Mombasa, Nairobi, Kisumu, Eldoret, Nyeri, Nakuru, Kitale, Nanyuki (agency only).

Barclays Bank (Dominions, Colonial, and Overseas), at Mombasa, Nairobi, Eldoret, Kitale, Nakuru.

A Land and Agricultural Bank under the control of the Government was formed with a capital of £240,000 in 1931. Provision was made in August, 1933, for a sum of £260,000 as additional capital for the Bank. Its business is to make advances to farmers for periods of from 10 to 30 years on first mortgage. Up to the 31st December, 1933, the Bank had advanced £306,050 against 246 mortgages registered.

During the nine months ending 30th of September, 1934, 120 mortgages were registered securing advances aggregating £143,565, making a total at 30th of September, 1934, of 366 mortgages for £449,615.

A Government Savings Bank operates in the territory. On the 31st of December, 1933, there were 10,705 depositors and the amount including interest standing to their credit was £172,126.

B. PUBLIC FINANCE.

1. Public Debt.

The public debt of Kenya includes moneys raised for the Kenya and Uganda Railways and Harbours Administration. On the 31st December, 1933, the total public debt was £17,205,600 made up of £3,953,792 in respect of the Colony and £13,251,808 in respect of the Transport Administration. In the case of the Colony's Loans the annual charges for interest in 1935 will be £186,184

and the Sinking Fund contribution £39,537. The interest charges on the Kenya and Uganda Railways and Harbours Loans during 1935 will be £685,012 and the contributions to Sinking Fund £132,519.

Total annual charges therefore amount at present to £1,043,252. The total value of the Sinking Funds on 31st December, 1933, was £1,042,774. See Appendix "A" for details regarding each loan.

2. Revenue.

(A) Analysis of Revenue.

The estimated gross revenue for 1934 is £3,198,973. This figure is reduced to a net revenue for the Colony of £2,122,497, after deducting (a) reimbursements by the Kenya and Uganda Railway and the Municipalities of expenditure on their behalf, (b) payments to the Governments of Uganda and Tanganyika Territory of revenue collected on their behalf, and (c) certain cross-entries.

Self-balancing Department.

	Revenue.	Expenditure.
Posts and Telegraphs Department ...	£167,596	£121,896
Balance net surplus ...	£45,700.	

General Revenue.

	£	Percentage.
Customs	644,500	32.2
Licences, Taxes, etc.	958,482	47.9
Fees and payments for specific services	111,515	5.6
Revenue from Government Departments, Government property, sales of land and other Government earnings	211,555	10.6
Interest	18,364	0.9
Miscellaneous	10,485	0.5
Surplus of self-balancing Department	45,700	2.3
	2,000,601	100.0
Expenditure of self-balancing Department set off against revenue	121,896	
	2,122,497	

(B) Analysis of Customs Revenue.

Kenya and Uganda form a single unit for purposes of customs. The gross Customs Revenue collected in 1933 amounted to £993,043. The net revenue amounted to £871,909 of which amount Kenya received £581,706.

Details of net revenue from principal imports during 1933:—

	£
Class I.—Food, drink, and tobacco	344,824
Class II.—Raw materials and articles mainly unmanufactured	1,822
Class III.—Articles wholly or mainly manufactured	476,918
Class IV.—Parcels Post	47,938

The following figures show the amount of duty collected on goods from the United Kingdom, the rest of the Empire, and foreign countries, in respect of the year 1933:—

Goods from—	Gross Import duty collected.
	£
United Kingdom	391,074
Rest of Empire	91,728
Foreign countries	507,214
Total	£990,016

3. Expenditure.

The estimated gross expenditure for 1934 was £3,188,041. This figure is reduced to a net expenditure for the Colony of £2,111,565 after deducting expenditure against (1) reimbursements on behalf of the Kenya and Uganda Railway and the Municipalities, (2) the payment to the Governments of Uganda and Tanganyika Territory of their share of the cost of common services, and (3) certain cross entries.

	£	Percentage.
Deficit on self-balancing Departments	—	—
Debt Charges	183,029	9.20
Administration... ..	703,340	35.35
Economic Development	411,073	20.66
Social Services	434,722	21.85
Defence	86,631	4.35
Non-effective charges, i.e., Pensions and Gratuities	170,914	8.59
	1,989,669	100.0
Expenditure of self-balancing Department set off against revenue	121,896	
	2,111,565	

4. *Reserve Funds.*

At 31st December, 1933, the Kenya Government had no special Reserve Funds, but the surplus of general assets over liabilities was £205,495.

5. *Grants-in-Aid, etc.*

5. No grant-in-aid had been given to Kenya since 1912. Up to the 31st December, 1933, grants amounting to £53,845 and loans amounting to £1,700 have been made from the Colonial Development Fund for the following purposes:—

	<i>Loan.</i>	<i>Grant.</i>
	£	£
Colonial Veterinary Scholarships	—	855
Cape—Cairo Air Service	1,000	48,433
Naivasha Agricultural Research Station	—	2,625
Sisal Decorticating Machinery	700	500
Locust Control Experiments	—	762
Tsetse Fly Control	—	670
	<u>1,700</u>	<u>53,845</u>

APPENDIX "A".

Public Debt on 31st December, 1933.

<i>Legal Authority.</i>	<i>Amount Raised.</i>	<i>Rate of Interest.</i>	<i>Value of Sinking Fund on 31st December, 1933.</i>	<i>Remarks.</i>
	£	Per cent.	£	
Ordinance 39 of 1921	5,000,000	6	801,639	Trustee Security.
" 22 of 1927	5,000,000	5	142,405	" "
" 22 of 1927	3,500,000	4½	98,731	" "
" 43 of 1930	3,400,000	4½	*	" "
" 25 of 1933	305,600	3½	—	" "

IV.—Trade Statistics.

The trade statistics of Kenya and Uganda are kept in a single document and it is not possible to give the imports of Kenya separately. The combined figures are given below as well as the details of the principal domestic exports from Kenya, without countries of destination.

In addition to the foreign trade of Kenya and Uganda specified below, a considerable trans-frontier trade in domestic products exists between the two territories. During 1933 the value of local produce exported from Kenya to Uganda amounted to £117,303. Conversely, Uganda produce to the value of £74,672 was consigned to Kenya during the year, mainly for local consumption. The value of imported goods transferred from Uganda to Kenya during the period under review was £21,023. The total trade of Kenya and Uganda for the year 1933 was therefore:—

	£
† Oversea exports from Kenya and Uganda	7,099,397
Kenya produce exported to Uganda	117,303
Uganda produce exported to Kenya	74,672
Imported goods transferred from Uganda to Kenya	21,023
Foreign imports into Kenya and Uganda	4,898,722
	<u>12,211,117</u>

EXPORTS.

(i) *Total exports of Kenya and Uganda (including Bullion and Specie) to:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	£	£	£	£
1913-14	686,643	118,451	677,782	1,482,876
1930	2,476,942	2,690,534	1,684,317	6,851,793†
1931	1,683,166	2,400,219	1,302,965	5,386,350†
1932	1,914,500	2,660,034	1,152,056	5,726,590†
1933	2,273,393	3,284,246	1,541,758	7,099,397†

* Contributions to the Sinking Fund in respect of the 1930 Loan commenced in July, 1934.

† Exclusive of exports for Ships' Stores to the value of £207,899.

‡ Exclusive of Ships' Stores, the value of which was as follows:—

	£		£
1930	96,425	1932	144,118
1931	119,593	1933	207,899

(ii) Domestic Exports of Kenya and Uganda by Classes, 1933.

To	Class I. £	Class II. £	Class III. £	Class IV. £	Bullion and Specie. £	Total. £
United Kingdom	934,607	1,022,437	10,686	87	69,437	2,037,254
India	3,859	1,818,487	12,907	60	—	1,835,313
Tanganyika Territory	164,731	9,376	25,928	48	—	200,083
Rest of Empire	290,484	28,542	62,649	97	—	381,772
Total Empire	1,393,681	2,878,842	112,170	292	69,437	4,454,422
Japan	851	330,170	118,711	310	—	450,042
Other foreign countries...	283,566	475,800	27,556	593	15	787,530
Total foreign countries	284,417	805,970	146,267	903	15	1,237,572
Ships' Stores	18,518	998	99	—	—	19,615
GRAND TOTAL	1,696,616	3,685,810	258,536	1,195	69,452	5,711,609

(iii) (a) Principal Domestic Exports of Kenya, 1933.

Articles.	Unit.	Quantity.	Value. £
Class I.			
Coffee, raw	cwt.	256,972	831,197
Maize	"	1,131,549	212,699
Tea	lb.	1,955,744	76,667
Sugar (refined)	tons.	4,111	66,735
Butter	cwt.	7,514	27,268
Wheat meal and flour	"	41,075	25,156
Potatoes	"	51,192	10,704
Class II.			
Sisal fibre	ton	19,140	243,352
Hides, dry and dry salted	cwt.	91,733	132,103
Wattle bark	"	216,081	46,614
Wool	centals of 100 lb.	9,330	38,481
Seeds, Sesame	ton	3,242	36,761
Cotton, raw	centals of 100 lb.	10,660	23,584
Skins (sheep and goat)	no.	960,610	20,496
Skins, other animal	"	7,417	6,725
Class III.			
Sodium carbonate	tons.	43,061	194,913
Wattle extract	cwt.	28,759	20,150
Class V.			
Gold bullion	Oz. troy	14,111	63,110

(iii) (b) Principal Domestic Exports (Kenya and Uganda) with countries of destination, 1933.

Article.	Total Quantity.	Total Value. £	Principal countries of destination with value in £'000.
Class I.			
Coffee, hulled parchment and unhulled.	357,416 cwt.	1,041,835	United Kingdom (576), Union of South Africa (95), United States of America (72), Canada (68), Aden (53), Egypt (36).
Maize	1,133,169 "	212,986	United Kingdom (142), Italian Somaliland (32).
Sugar (Jaggery and refined)	11,344 tons.	195,765	United Kingdom (131), Tanganyika (61).
Tea	1,985,872 lb.	78,022	United Kingdom (58), Tanganyika (10).
Tobacco and cigarettes	542,032 lb.	31,427	Tanganyika (24), United Kingdom (7).
Wheat and maize meal and flour	66,000 cwt.	30,963	Tanganyika (29).
Class II.			
Cotton, raw	1,189,975 centals of 100 lb.	2,705,794	India (1,806), United Kingdom (531), Japan (324)
Cotton seed	81,377 tons	262,848	United Kingdom (all).
Sisal, fibre	19,140 tons	243,352	Belgium (102), United Kingdom (70), Germany (27), Netherlands (16).
Hides and Skins—			
Hides, dry and dry salted	105,058 cwt.	152,299	United Kingdom (41), Belgium (36), Italy (32), Germany (22).
Skins, sheep and goat	1,040,310	22,646	United Kingdom (10), United States of America (5), France (5).
Skins, other animal	7,491	6,742	Italian Somaliland (4).
		181,687	
Sesame seed	5,901 tons	67,143	Italian Somaliland (43), Denmark (13).
Tin ore	428 "	57,503	United Kingdom (41), Netherlands (9), British Malaya (7).
Wattle bark	216,081 cwt.	46,614	Netherlands (22), United Kingdom (7), Germany (6).
Wool	9,330 centals of 100 lb.	38,481	United Kingdom (27), Belgium (11).

Article.	Total Quantity.	Total value.	Principal countries of destination with value in £'000
<i>Class III.</i>			
Sodium carbonate ...	43,051 tons	194,913	Japan (111), Australia (49), India (13).
Wattle extract ...	28,759 cwt.	20,150	Japan (8), United Kingdom (7).
<i>Class V.</i>			
Gold bullion ...	15,194 Oz. troy	69,452	United Kingdom (69).

IMPORTS.

(i) *Total Imports into Kenya and Uganda (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913 ...	907,410	433,437	807,190	2,147,937
1930 ...	3,581,397	1,651,322	2,856,230	8,088,949
1931 ...	2,559,576	1,072,083	2,116,225	5,747,884
1932 ...	1,915,374	1,175,058	1,784,140	4,874,572
1933 ...	1,875,113	1,231,611	1,791,998	4,898,722

(ii) *Imports by Classes, 1933.*

From	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom ...	223,300	9,333	1,370,046	213,205	1,815,984
Tanganyika Territory ...	481,212	141,287	3,885	282	626,666
India ...	61,367	3,738	239,404	13,638	318,147
Rest of Empire ...	63,156	98,612	102,441	6,421	270,630
<i>Total Empire</i> ...	829,035	252,970	1,715,786	233,646	3,031,437
Japan ...	1,118	47	629,690	2,152	633,007
United States of America ...	12,593	174	194,246	5,750	212,763
Netherlands ...	66,713	91	100,356	641	167,801
Germany ...	5,848	84	136,797	10,348	153,077
Other foreign countries ...	69,937	20,313	508,560	21,862	620,672
<i>Total foreign countries</i> ...	156,209	20,709	1,569,649	40,753	1,787,320
GRAND TOTAL ...	985,244	273,679	3,285,435	274,399	4,818,757

In addition £79,966 of bullion and specie were imported into the territories, of which £59,129 came from the United Kingdom; £16,158 from Tanganyika Territory and £4,678 from foreign countries.

(iii) *Principal Imports, 1933 (excluding articles mainly imported for re-export).*

Article.	Total Quantity.	Total Value.	Principal countries of origin with values in £'000.
<i>Class I.</i>		£	
Tobacco, Cigarettes and Cigars.	1,229,565 lb.	173,668	United Kingdom (78), Netherlands (51), Tanganyika (35).
Spirits—			
Whisky ...	47,393 gal.	61,416	United Kingdom (61).
Other kinds ...	15,934 „	15,337	France (7), United Kingdom (6).
	63,327 „	76,753	
Wheat ...	158,150 cwt.	52,862	Australia (34), Argentine (9), Canada (8).
<i>Class II.</i>			
Coal ...	85,156 tons	96,818	Union of South Africa (95).
<i>Class III.</i>			
Cotton manufactures—			
Piece goods—			
(a) Grey, unbleached ...	21,325,021 yd.	192,857	Japan (162), United States of America (17).
(b) Bleached ...	3,592,107 „	41,756	Japan (27), United Kingdom (11), Netherlands (2),
(c) Printed (including Khangas).	7,156,986 „	91,091	Japan (59), United Kingdom (25), Netherlands (5).
(d) Dyed in the piece ...	6,915,690 „	151,838	United Kingdom (97), Japan (45),
(e) Coloured (manufactured wholly or in part of dyed yarn).	12,736,604 „	172,636	Japan (85), Netherlands (45), India (29), United Kingdom (11).
Blankets ...	1,531,755 No. 25,979 cwt.	95,142	Netherlands (33), Belgium (19), Czechoslovakia (18)
Other manufactures ...	203,020 lb.	16,855	United Kingdom (12), India (3).
		762,175	

Article.	Total Quantity.	Total Value.	Principal countries of origin with values in £'000.
<i>Class III.—cont.</i>			
<i>Oils—</i>			
		£	
Fuel	10,815,030 gal. Imp.	110,767	Persia (90), Dutch East Indies (20).
Motor Spirit	5,228,252 „	99,106	Dutch East Indies (54), Persia (31), United States of America (13).
Lubricating	451,963 „	47,093	United States of America (23), United Kingdom (19), Dutch East Indies (3), Germany (2).
Kerosene	2,564,880 „	45,270	Persia (23), Dutch East Indies (11), United States of America (8).
		302,236	
<i>Motor cars, lorries, etc. and parts, etc.—</i>			
Motor Cars	720 vehicles	92,859	United Kingdom (40), Canada (29), United States of America (23).
Motor lorries and tractors...	539 „	65,518	United Kingdom (23), Canada (23), United States of America (18).
Parts and accessories ...		48,485	United States of America (19), United Kingdom (17), Canada (7).
Tyres and tubes		78,375	United Kingdom (30), Canada (18), United States of America (11), France (7).
		285,237	
<i>Machinery and parts—</i>			
Industrial		130,439	United Kingdom (92), Germany (10), United States of America (8), Denmark (8).
Other kinds		99,106	United Kingdom (67), Germany (10).
		229,545	
Jute bags and sacks	440,184 doz.	127,919	India (127).
<i>Silk and artificial Silk manufactures—</i>			
Artificial silk piece-goods ...	4,300,456 lin. yd.	70,871	Japan (68), United Kingdom (1), China (1).
Silk tissues	754,372 „	28,869	Japan (22), China (3), Hong Kong (2).
Other manufactures		1,088	
		100,828	
Paper manufactures		97,820	United Kingdom (66), Italy (7).
Galvanized iron sheets corrugated.	4,244 tons	56,384	United Kingdom (32), Belgium (24).

V.—Natural Resources.

A.

1. AGRICULTURAL.

The resources of the Colony are principally agricultural. Agriculture, including livestock rearing, is the principal occupation of both European settlers and the natives.

Of the total area of about 6,550,400 acres so far alienated, the area actually in European occupation on the 28th February, 1934, was 5,128,324 acres. Of this area:—

556,182 acres were under cultivation.

1,537,002 acres were grazed by cattle owned by Europeans.

765,291 acres were grazed by sheep owned by Europeans.

Of the remainder, a portion is devoted to the maintenance of squatters and their cattle, sheep, and goats.

European Agriculture.—The chief crops grown in bulk by Europeans on the 556,182 acres under cultivation are coffee, maize, sisal, wheat, tea, sugar-cane, and coconuts, while fruit-growing, essential oil production, pyrethrum and potato cultivation are being developed. The European farming community is gradually turning over to a more mixed and settled type of farming and many other crops common to farms in Europe are successfully grown for domestic consumption.

The local market for agricultural products is very restricted and usually a proportion of every crop has to be exported.

Agricultural production in Kenya is subject to certain factors which handicap it seriously in periods of depression and low commodity prices. The principal productive areas are remote from the coast and heavy transport charges have to be incurred. The sea transport charges are high by reason of the fact that almost all goods have to reach their market via the Suez Canal. Crops of which the value per unit of weight is high have naturally been the most profitable. At the present time coffee is giving the most profitable return. A crop of which the value per unit of weight is comparatively low, e.g., maize, is severely handicapped under present conditions.

Farmers' Associations exist in all districts and do much to assist sound agricultural development. The Kenya Farmer's Association (Co-operative) Ltd. is the main co-operative organization. This Association, in addition to providing co-operative facilities for the purchase of farm requirements, markets most of the maize grown by Europeans and also pulse crops. In addition it is also the sole selling agency for wheat and is able to undertake similar work for other crops.

The institution of maize and wheat pools by this Association has resulted in a good average price being received by the producer and has done much to minimize the effect of low export prices. The Kenya Planters Co-operative Association, though still a small organization, provides agricultural requirements to its members at co-operative prices. Other organizations, not of a co-operative nature, represent and advise on the problems of special industries. The principal ones are the Coffee Board of Kenya, the Tea Growers' Association, the Sisal Growers' Association, the Wheat Advisory Board and the Pyrethrum Growers' Association. The Coffee Board is a statutory body set up by the Government of Kenya, consisting of both officials and unofficials, with executive powers. The Board undertakes the advertisement of Kenya coffee and other steps for the extension of markets and any other services approved by Government for the promotion of the welfare of the coffee industry such as research directed to its more economic production and preparation. In addition to its local staff in Kenya it maintains a representative in London. It is financed by a cess on coffee exported, which is at present 6d. per cwt. and may be increased to a maximum of 1s.

Indian Agriculture.—A general census of Indian agriculture has not been taken for the twelve months ending 29th February, 1934, but according to the latest figures available, the area in the occupation of Indian cultivators is 34,315 acres, of which two-thirds are in the Coastal belt, mostly under coconut palms, and the remainder in the Kibos-Miwani area (near Lake Victoria Nyanza), where sugar-cane is the principal crop.

Native Agriculture.—Though precise statistical information is not available it is estimated that about 1,750,000 acres are under crops of one sort or another. The principal crops are sorghum, millets, maize, pulse crops, root crops (such as potatoes, sweet potatoes and cassava), bananas, sesame seed, groundnuts, cotton and wattle.

The last four are the chief cash crops exported from the reserves and, except for wattle, can only be grown in certain small and well defined areas generally of low altitude. Nevertheless the production of wattle bark has doubled and that of cotton trebled during the past two or three years. The surplus production of the other (food) crops, such as maize, is also sold outside the reserves but the prices of these crops have remained very low in recent years. Generally speaking the more fertile areas of the Colony are at too high an altitude for the production of those relatively high priced export crops usually associated with native agriculture in other countries. Cash value of exports is therefore not high, but volume of exports from the Reserves, which is a better index of native effort, is not unsatisfactory; much of the exports from the Reserves is consumed by Europeans or by labour on European estates and at the mines.

In order to overcome this handicap of low priced crops, attention is being directed to the growing of coffee by natives. Large areas of some native reserves are suitable for coffee, but, in view of the difficulty of controlling pests and diseases in small and scattered native plantations and of the danger from these to an already established and profitable European coffee industry, considerable care has to be exercised in establishing coffee as a native industry. Experimental areas are being planted in a few districts and further coffee growing by natives will depend on the experience gained in these areas.

Native agriculture is now progressing under a sustained plan of development, based on a survey of the potentialities of each agricultural zone. The safeguarding of food supplies is being assured by the trial and distribution of improved varieties of crops, either introduced or locally selected. At the same time the growing of a large acreage of crops suitable for export is receiving the closest attention with a view to increasing the wealth of the native population. The output of cotton and wattle bark could be doubled again without undue strain and a largely increased acreage of groundnuts and sesame seed could be grown with better prices. A cashew nut industry is becoming established in the Coastal belt where several hundred thousand trees have been planted. This industry is a promising one and the export of the nuts should provide a valuable cash return.

The principles of organized marketing have been applied to cotton, wattle bark and cashew nuts. Such marketing ensures fair prices being received by the growers. Legislation exists prohibiting the purchase or sale of inferior produce, and the inspection services which have been provided to implement this legislation have effected great improvements in the quality and price of the more important native products. Local Native Councils, with agricultural sub-committees, have been established in most administrative districts and contribute funds towards the furtherance of agricultural projects, particularly towards the operations of seed farms, established for trial of crops and multiplication of seed.

A brief account follows of the principal agricultural crops, roughly in order of importance.

Coffee is grown almost exclusively by Europeans, the variety grown being *Arabica*. Although so far as acreage is concerned coffee comes after both maize and sisal, the value of the annual crop much exceeds that of any other single crop.

As the price of Kenya coffee, owing to its high quality, has resisted the effects of the general depression more successfully than the prices of most other Kenya products, the total area under coffee is still increasing, and this process is likely to continue. There are now rather more than 900 European coffee estates.

More than half of the coffee crop is grown within a radius of 50 miles to the north and north-west of Nairobi at an average altitude of between 5,000 and 6,000 feet. The development of such a large proportion of the coffee plantations in this area is due to the original coffee seed imported into the Colony having been planted near Nairobi and to the crop having been first proved successful there. Coffee is also produced in several areas further west between the Rift Valley and Lake Victoria and is proving distinctly promising, though, owing to a difference in climatic conditions, it may become advisable to grow a different variety from that grown near Nairobi. Much research and investigation is at present being carried on into methods of cultivation, pruning, seed selection, pests and diseases, manuring and soil improvement.

Coffee curing and cleaning factories exist at Nairobi, Kitale and Mombasa. In the past the greater part of the coffee crop has been shipped to London for sale at the public auctions, but recently the tendency has been, with the development of the local market, for a greater part of the crop to be sold in Nairobi for shipment direct to oversea markets and for less of the crop to go to London for re-export. London, however, remains the best market for the disposal of the finest types.

The total area under coffee in 1933-34 was 102,238 acres and the crop was 235,009 cwt. of clean coffee. The total amount of coffee of Kenya origin exported during recent years has been as follows:—

			<i>Cwt.</i>	£
1929	...	...	133,234	703,158
1930	...	...	310,168	1,427,536
1931	...	...	245,991	986,988
1932	...	...	276,041	1,214,392
1933	...	...	257,214	832,353

Maize is the most widely cultivated crop both on European estates and in the Native Reserves, and it grows well in most parts of the Colony. The type of maize produced is a flat white dent such as is grown in South Africa. This type of maize commands a slight premium over yellow maize for certain special purposes (manufacture of starch, alcohol, etc.). The average acre yield of maize in the Colony is eight to nine bags of 200 lb. to the acre, but many estates produce fifteen bags or more. Since maize is a low-priced crop, considerable attention is being given to increasing acre yields by improving methods of planting and cultivation, by better seed selection and by breeding new strains resistant to disease.

The native maize crop has in the past been almost entirely consumed locally; it is now, however, largely of exportable quality. Much of the European crop is exported, the amount depending on the supplies of native maize available for the local market. The following table shows that most of the 1931-32 crop was exported but that in 1932-33 most of it had to be retained in the Colony for local use as food for the native population. The acreage under maize on European estates has steadily fallen from over 200,000 acres in 1930 to just over 100,000 acres in 1934. This has been due to low prices and the fear of locusts.

The following table shows the European production and the total exports during the past five years:—

<i>Season.</i>	<i>Production.</i> <i>Bags of 200 lb.</i>	<i>Equal to cwt.</i>	<i>Year.</i>	<i>Exports.</i> <i>Cwt.</i>	£
1929-30	1,858,586	3,318,904	1929	764,770	305,892
1930-31	1,649,728	2,945,943	1930	2,222,549	565,517
1931-32	762,622	1,361,825	1931	1,859,517	419,599
1932-33	1,139,616	2,035,029	1932	514,917	117,677
1933-34	746,893	1,333,737	1933	1,131,549	212,699

Sisal is grown only by Europeans on the plantation system and generally on a fairly large scale by companies owning their own decorticating machines, etc., since small-scale production is uneconomical.

The total area under sisal in 1932-33 was 139,834 acres and the crop was 17,369 tons; in 1933-34 the area was 141,495 acres, and the crop 20,127 tons. The greater part of the acreage is in the Highlands, but some development has taken place in the coastal area. Sisal does not grow as rapidly in the Highlands as on the coast, the leaf is shorter and complete recovery of the fibre content perhaps more difficult. These features, coupled with the greater cost of transport to the port, place sisal from the Highlands at a disadvantage compared with that grown on the coast.

Considerable work is being done to improve the method of fibre-extraction, and the system of planting.

The price of sisal remains unsatisfactory, but with improvement in the methods of production it may now be possible to carry on the industry without actual loss. The world statistical position of sisal unlike that of maize and certain other commodities, is not complicated by the existence of large unsold surpluses. The possibility of the use of sisal for other purposes than twine, small cords, and ropes, e.g., cloth, sacks, straw boards, and paper, is being examined.

The following table shows the total production and total exports during the past five years:—

<i>Season.</i>	<i>Production.</i> <i>Cwt.</i>	<i>Year.</i>	<i>Exports.</i> <i>Cwt.</i>	£
1929-30	346,420	1929	312,954	553,572
1930-31	377,160	1930	318,980	437,269
1931-32	293,480	1931	319,880	232,564
1932-33	347,380	1932	307,700	186,575
1933-34	402,540	1933	397,000	249,868

Cotton is an important native crop in two somewhat restricted areas, the lower elevations in the Nyanza Province about Lake Victoria, where conditions are admirably suited to cotton, and in the Coastal Province. In the last few years the efforts for increased production have been highly successful as is indicated by the following table which shows the quantity of seed cotton purchased by the ginneries during the last four years.

<i>Year.</i>	<i>Total quantity of</i> <i>seed cotton purchased.</i> <i>Tons.</i>
1930-31	443
1931-32	1,226
1932-33	2,493
1933-34	3,708

Further extension in these areas is taking place and there is promise of new cotton areas in the lower parts of the Central Province where the crop is as yet in the experimental stage.

Production was estimated at 1,735 bales in 1932 and 3,037 bales in 1933.

Wheat has been cultivated principally by Europeans, though natives are beginning to grow a small quantity and may grow more when the crop is better understood. As in the case of maize, and for the same reasons, the acreage under wheat has fallen by half to 30,000 acres. Up to 1933 the average yields per acre had been only between six and ten bushels net due to rust diseases and to locusts. In 1933 the average yield rose to about twelve bushels per acre and many farmers are obtaining over twice that amount. This change in the position is largely due to the success which has attended the breeding of new varieties of wheat resistant to the three species of rust present in the Colony. The replacement of the old varieties of wheat with the new ones (now taking place) will undoubtedly result in a larger production of wheat and in a surplus for export above the local requirements which may amount to about 200,000 bags (say 17,850 tons). It is hoped that the increased yields will enable wheat to be grown at a profit even if a fair proportion has to be exported at low prices. Wheat is the main cash crop at the higher elevation of 7,000 to 9,000 feet and is an important one at certain lower altitudes which have a low rainfall.

Tea is an important crop in the high rainfall area of Kericho in the Nyanza Province and at Limuru. The tea principally grown consists of Assam *jāts*, but experience has shown that local conditions require certain alterations of the usually accepted methods of cultivating, pruning, and fermentation. The rainfall is adequate but in the middle of the day or during periods of dry weather the leaf becomes flaccid or even "leathery".

The quality of tea produced at present is not more than medium, but there is every prospect of an improvement as plantations become older and as more experience is gained. Sufficient rainfall for successful tea growing only falls over a small area in Kenya but the prospects for a small remunerative industry are reasonably bright.

The area under tea increased from 10,052 acres in 1929-30 to 12,471 acres in 1933-34 and the crop from 930,209 lb. to 3,063,687 lb.

The Government has enacted legislation for the restriction of tea-growing, in accord with the other East African Colonies in which this crop is grown, under the international tea regulation scheme.

About one-third of the crop is now consumed internally; the remainder is exported, mostly to the United Kingdom. The following table shows the total production and total exports over the last five years:—

<i>Production.</i>			<i>Exports.</i>		
<i>Season.</i>		<i>lb.</i>	<i>Year.</i>		<i>£</i>
1930-31	...	930,209	1930	...	160,384
1931-32	...	1,500,249	1931	...	353,696
1932-33	...	2,421,056	1932	...	700,224
1933-34	...	3,063,687	1933	...	1,955,744
					8,192
					16,795
					29,262
					76,667

Wattle is becoming a crop of increasing importance. The area under wattle on European estates increased from 11,702 acres in 1930-31 to 17,788 acres in 1933-34, but by far the greater part of the wattle cultivation is carried on in the Native Reserves, particularly in the Central Province, where probably some 50,000 acres are under the crop. Wattle bark not only gives a useful cash return to the natives but the crop also acts as a restorer of soil fertility and the poles are useful for fuel, building and constructional purposes.

The present sound position and bright outlook for the native wattle industry is largely due to the organized marketing and inspection services recently instituted. The inspection services prevent the export of bark of low quality.

The wattle trade is in the hands of two firms, the bigger of which is the Natal Tanning Extract Co. Ltd., a subsidiary company of the Forestal, Land, Timber and Railways Co. Ltd., who have erected factories for the preparation of wattle extract. This firm has also a factory for chopping and packing bark for export.

All the bark produced is exported either as bark or wattle extract and the following table shows the Colony's production and value of exports during the past five years.

			<i>Bark.</i>		<i>Extract.</i>	
<i>Year.</i>			<i>Cwt.</i>	<i>£</i>	<i>Cwt.</i>	<i>£</i>
1929	...	...	63,342	25,336	21,777	28,310
1930	...	...	131,160	44,680	16,729	18,400
1931	...	...	192,368	67,203	6,073	6,028
1932	...	...	236,545	78,811	9,809	7,055
1933	...	...	216,081	46,614	28,759	20,150

Sugar-cane is grown chiefly in the Nyanza and Kikuyu Provinces and to a less extent in the coastal districts. The cultivation is carried out principally by Europeans, to a small extent by Indian farmers, and to a minor extent by natives. The total area under this crop in non-native areas was 12,088 acres in 1932-33 and 12,704 acres in 1933-34. The yields of sugar were 106,320 cwt. and 112,980 cwt. respectively.

Sugar is manufactured in Kenya (and also in Uganda) to supply the needs of the Colony and adjacent British territories, sufficient protection being afforded by tariff to assure these markets for the local industry. Production has now increased so as to provide a surplus over East African requirements and in 1933 4,132 tons were exported to the United Kingdom from Kenya. Other crops are comparatively speaking of minor importance.

Coconut palms are grown on comparatively wide areas in European possession (about 8,000 acres), in Indian possession (perhaps about the same) and in the Native Reserves, but the output in fresh nuts and copra is relatively inconsiderable.

Essential oil production is still in an early stage of development. *Geranium* oil is being produced by two estates and improved stocks have recently been obtained from Réunion and the South of France. The prospects of the industry are promising. Experimental trials are being made with *peppermint* and several varieties of *eucalyptus*, and it is hoped to develop *lavender* oil. *Lemon-grass* oil is another promising product as the grass grows prolifically. There seems to be some prospect of developing the production of *cedar-wood* oil from saw-mill waste, and *camphor* from the common weed *Ocimum commune*.

Pyrethrum grows well in certain areas and possesses a higher percentage of toxicity than that grown in Japan and other countries, which have hitherto been the world sources of supply. The industry is developing rapidly. Local requirements for insecticides are now satisfied and there is a growing export trade.

The other European and native grown crops are mostly used for internal consumption as food.

2. FORESTRY.

The total area of proclaimed Forest Reserves at the end of 1933 was 3,014,080 acres (4,709.5 square miles) made up of 4,476.4 square miles of Crown forest areas and 233.1 square miles of native forest areas. In addition general agreement had been obtained to the reservation of another 160 square miles of native forests. There are other forests in the Colony amounting to not less than 600 square miles which still await examination and survey before proposals for their reservation can be made. Native forests are those situated in Native Reserves and managed by the Forest Department on behalf of the local native community.

Of the whole area of forest land, reserved and unreserved, it is estimated that the composition is approximately as follows:—

	Percentage.
Merchantable timber and fuel	29
Plantations	1.6
Timber not economically accessible	13.7
Bamboos	15.5
Protection forests	12.2
Bush	6.2
Moorland and grass	21.8
	100

Apart from Crown and native forests, areas totalling approximately 222 square miles have been included on alienated lands. These forests are for the most part being rapidly exploited and will cease to be of much economic importance in the course of a few years.

In the Forest Reserves cutting rights have been granted, under 19 saw-mill licences, over 435,648 acres but of this area it is estimated that not more than 190,000 acres carry timber in workable quantities. In addition numerous temporary licences for small areas, or individual trees, considerably increase the total output.

The timber trade is mainly concerned with local requirements. The export trade is at present small but, as the forests can produce a large surplus over local needs, efforts are being made to increase it.

In 1933 the total quantity of timber sold in the log from the Forest Reserves was 643,864 cubic feet, compared with an average of 1,107,034 cubic feet for the previous six years. No figures are available for the quantities cut in private forests, nor for the total consumption of sawn timber in the country.

The timber is used locally mainly for construction purposes but also for joinery and cabinet work, wagon building, etc., very little being imported for these purposes. There is a growing demand for box shooks though up to the present the local industry has found it difficult to compete as regards price or quality. Shooks to the value of £16,793 were imported in 1933.

The most important export product of the Kenya forests is cedar in the form of pencil slats of which the export in 1933 amounted to 46,010 cubic feet valued at £12,476. 41,777 cubic feet of other timber—mainly softwoods (*Podocarpus*)—were exported to neighbouring territories. The value of this timber was £6,275. The possibility of exporting certain hardwoods, such as East African olive and camphor, to Great Britain and elsewhere is under examination.

Very large quantities of wood fuel and poles are cut annually in the forests and plantations, mainly in the latter which now amount to about 41,086 acres. There is a regular export of poles in which there was a considerable revival during the year, exports rising from 54,000 poles in 1932 to 214,390 poles valued at £2,075 in 1933.

A large bamboo paper pulp concession was granted in 1931. No work has yet been done on the area but considerable progress has been made by the licensee with preliminary investigations and plans for development.

3. ANIMAL HUSBANDRY.

Animal husbandry is the principal occupation of the pastoral tribes, notably the Masai, Nandi, Turkana, and the tribes of the Northern Frontier Province; it is also an important part of the activities of a number of European settlers.

The Colony is self-supporting in all animal products and has built up a certain export trade to neighbouring African territories and in the case of butter to the United Kingdom. So far as wider markets are concerned the prospects, particularly at anything like the present price levels, are not very bright. Compared with other Empire producers the total output of Kenya is insignificant and the inevitable consequence is a higher level of production costs. The European industry is situated some distance from the coast with the result that freight charges are an important item.

With the assistance of a heavy protective duty on imports (in most cases 20 per cent. *ad valorem* with a suspended duty of 10 per cent.) a high enough internal price level has been maintained to

render possible a certain export trade in various dairy products, but the problem of disposing of surplus supplies of meat has yet to be solved. The most promising line of advance at present in sight is the encouragement of greater meat consumption by the native population. Except in the case of bacon and ham, there is little prospect of Kenya's being able to compete successfully in the meat markets of the world.

Milk, cream, butter-fat, butter, cheese, bacon, ham, and wool are produced mainly by Europeans, while both Europeans and natives supply the market with mutton, beef, ghee, hides, and skins.

Mutton, beef, milk, ghee, and blood drawn from the living animal form the principal articles of diet of certain of the pastoral tribes.

The latest estimate of the live-stock population of the Colony was made in July, 1930, for native-owned live-stock and in February, 1933, for European-owned live-stock, and was as follows:—

	<i>Owned by Europeans.</i>	<i>Owned by non-Europeans.</i>
Cattle	259,188	4,950,000
Wool-bearing sheep	203,372	—
Native sheep	36,134	3,000,000
Goats	2,441	4,320,000
Pigs	14,631	70
Horses	2,346	140
Mules	428	150
Donkeys	1,047	215,000
Camels	—	180,000
Poultry	57,037	—

Most of the donkeys are in the Masai Province and most of the camels in the Northern Frontier Province.

The total amount of dairy produce and the like sold by Europeans during the years ending February, 1933, and 1934, was as follows:—

	1932-33.	1933-34.
Milk (whole)	1,138,743 gal.	939,434 gal.
Cream	73,387 "	85,678 "
Butter-fat	923,042 lb.	754,808 lb.
Butter	350,405 "	307,349 "
Ghee	47,110 "	35,708 "
Cheese	155,525 "	140,633 "
Wool	721,542 "	931,330 "

The principal exports from Kenya ports, all of which may be regarded as of Kenya origin, in 1933, were as follows:—

	<i>Quantity.</i>	<i>Value. £</i>	<i>Destination.</i>
Butter	7,514 cwt.	27,268	United Kingdom, Tanganyika.
Ghee	2,309 "	7,118	Tanganyika, Zanzibar.
Cheese	473 cwt.	2,186	Tanganyika, India.
Bacon and Ham	691 "	4,638	Tanganyika.
Wool	8,330 centals of 100 lb.	38,481	United Kingdom, Belgium.
Hides, dry and drysalted	91,733 cwt.	132,103	United Kingdom, Belgium, Italy, Germany.
Skins, sheep and goat	960,610 No.	20,496	United Kingdom, United States of America, France, India.

The hides and skins are mainly from Native Reserves. The local market is now fully supplied with poultry and eggs.

There are three creameries and a well-equipped bacon factory in the Colony.

The latter provides practically all the bacon exported to neighbouring countries and also has a large output of tinned products, most of which are consumed in Africa.

Mixed farming is developing in the Colony, and it is anticipated that live-stock will play an increasingly important part in the maize- and wheat-growing areas. An increased production of dairy products is to be expected and attention is being given to the prospects of producing poultry and eggs for export. An export of eggs has already commenced.

4. MINERALS.

While no systematic geological survey of Kenya has yet been carried out, considerable progress has been made as to ascertaining the mineral resources of certain areas.

Short Reports have been published by the Government Geologist and Mining Engineer on "The Loldai-Ngara Ndare Area", "The Lolgorien Area", "Geological Survey of Kenya—Notes on the Geological Succession, Tectonics, and Economic Geology of the Western Half of Kenya Colony".

Considerable further information is also acquired by the terms under which concessionaires hold Exclusive Prospecting Licences. An aerial survey of some 2,500 square miles has already been made by concessionaires in Nyanza Province as a basis for geological plans to be furnished by them. A geological plan is an essential condition of every licence granted except for purely alluvial development.

The gold industry is a comparatively recent one, but its importance has been increasing rapidly, particularly since the United Kingdom left the gold standard in September, 1931. Surface evidence of payable gold has been found over a wide area in the Nyanza Province and the southern part of the Masai Reserve and extended prospecting is now in progress. The ultimate value of the gold field can, of course, only be determined after examination at deeper levels.

Traces of gold are widespread in rocks of the basement complex and have been found in the gravel of numerous streams traversing these rocks. No attempt has yet been made to follow the indications to their source.

The metal is also found in streams draining the rocks of the Kisii series but no alluvial concentration of note has been discovered.

In economic quantities, gold is found closely associated with a "young granite", outcropping widely in the south-western quarter of the Colony. Both the granite and the rocks into which it is intrusive—in most cases, members of the Muva-Ankolean series—carry auriferous quartz veins and, more rarely, "replacement deposits".

The output of gold between the 1st January, 1926, and the 31st December, 1933, is as follows:—

Year.	Northern Area Kakamega.		Southern Area Gori.		Total.	Total output to date.
	Reef. oz.	Alluvial. oz.	Reef. oz.	Alluvial. oz.		
1926	—	—	667	—	667	667
1927	—	—	661	—	661	1,328
1928	—	—	707	—	707	2,035
1929	—	—	845	—	845	2,880
1930	—	—	1,789	—	1,789	4,669
1931	—	404	2,765	—	3,169	7,838
1932	—	6,015	4,778	—	10,793	18,631
1933	4,427	3,655	6,060	5	14,147	32,778

The value of the 1933 gold output amounts to £67,665.

The following economic minerals have been located:—

Asbestos.—Tremolite asbestos occurs at a certain horizon in the rocks of the basement complex and has been exploited to a small extent at its occurrence near Simba. It has also been found near Kacheleba and in the Lengishu Hills.

Baryte.—This mineral is found in the Coastal Province at Samaloweni, where it forms an important gangue mineral in a mixed sulphide lode.

Copper.—Apart from chalcopyrite being found as an accessory mineral in numerous auriferous lodes, small quantities of copper sulphide have been found in the country lying to the north-east of Embu, where it occurs in a amphibolite schist. It also occurs in a mixed lead-zinc-baryte vein at Samaloweni.

Diatomite.—Abundant outcrops of diatomite are found in the Rift Valley (e.g., between Gilgil and Elementeita) and in the lacustrine beds of the Highlands (e.g., on the road twenty miles east of Narok where it occurs at a height of 6,300 feet).

Lead.—Galena is found as an accessory mineral in a mixed sulphide-baryte vein at Samaloweni (Coastal Province).

Limestone.—Marine and terrestrial deposits of limestone are abundant in the Coastal Province, and in the Jurassic rocks found between the Simba Hills and the Coast, wide beds of pisolitic limestone are found.

In the basement complex, an enormous thickness of marble marks a constant horizon. Outcrops are found between Maktau and Voi, running in a north-westerly direction; near Kajiado, where the rock is burnt for lime and also used for cutting into ornamental stone; in the Loldaika Hills; and north of Kacheleba in the Suk district.

Manganese.—Massive psilomelane was recovered from drill-holes bored for water in the southern part of the Coastal Province. An examination of the occurrence has been arranged.

Tin.—Cassiterite is found in the streams draining the rocks of the Kisii series. It is found "*in situ*", in a wide band of stanniferous gneiss which outcrops over great areas in the Ligari-Hoey's Bridge area. Individual samples have yielded assays in which the content of metallic tin rose to 3.8 per cent., but the average of many samples lies near 0.01 to 0.02 per cent. Sn.

Zinc.—Zinc-blende occurs as an accessory mineral in a mixed sulphide baryte vein at Samaloweni (Coastal Province).

Zircon.—This mineral, of universal distribution in small quantities, has been found in unusually large quantities in the stream-gravels of the Coastal Province, particularly where the sources of the drainage lies in those hills forms of the Simba grits.

The recovery of sodium carbonate from the Magadi Lake is a business of considerable dimensions. The exploitation is in the hands of a limited company, the Magadi Soda Company, Limited.

Total exports in recent years have been as follows:—

Quantities in tons.			Quantities in tons.		
Value in £.			Value in £.		
1929	55,137	277,294	1932	37,263	169,972
1930	49,270	222,305	1933	43,051	194,913
1931	44,170	199,389			

The principal customer is Japan, which took 24,625 tons in 1933; other countries taking more than 1,000 tons each in that year being Australia, India, the Argentine, and the Union of South Africa.

5. FISHERIES.

A considerable fishing industry is in being both on the coast and on Victoria Nyanza. Fish are supplied to Nairobi and other accessible towns from both these sources. No figures indicative of the volume of this trade are available.

The number of persons engaged in the sea fisheries is about 1,185 with 93 boats, 479 canoes, and 111 stakes.

A survey of sea fisheries was undertaken in 1928. It is believed that with the introduction of modern methods, this industry is capable of considerable development. Most of the fishing at present is done with boats and nets that are unable to face a rough sea.

There are 8 fishing licences in force for lake fishery, but no further statistical details are available.

B.

FOOD SUPPLIES.

So far as the food supply of the native population is concerned the Colony is almost entirely self-supporting. Though considerable quantities of European foodstuffs are imported the Colony could probably be completely self-supporting if the necessity arose.

Special efforts are being made to increase native production, and to improve the marketing of native-grown products.

Since the natives do not store sufficient food to meet their requirements over any considerable period of time, failure of the normal rains sometimes causes food shortage in certain areas. When the danger of a possible shortage of food in any area becomes apparent, steps are taken by Government to control the exports of food from that area. On the exceptional occasions when famine conditions arise relief measures are taken by Government. Of recent years a severe infestation of locusts has caused food shortages in some areas. Present indications are that the infestation, which has abated considerably in its severity, is almost at an end.

VI.—Industry.

No precise details regarding industrial activities in the Colony are available.

Most industrial establishments are operated in connexion with those branches of primary production with whose products they deal.

The most important are the coffee-curing works, creameries, and bacon factory to which reference has been made above, the sugar mills belonging to the Victoria Nyanza Sugar Refining Company, and other sugar companies in the Colony, the flour mills, the decorticating factories run in connexion with the sisal industry and the distilling plants for geranium and cedar-wood oils.

Industries not directly related to primary production are:—

(1) the Kenya Brewery, which in 1933 brewed 110,006 standard gallons of beer and stout of a sale value of approximately 4s. per gallon;

(2) The soap factories, which manufacture between 120,000 and 144,000 cases of common soap;

(3) the manufacture of aluminium hardware;

(4) various jam factories and two canning plants at Machakos and Kitale.

The Government has power to control the manufacture of sisal bags and reasonable protection to the local product, if and when manufactured, is provided by the Sisal Bag Industry Ordinance, 1932, which in Section 3 fixes minimum sale prices for certain bags and in Section 4 prescribes that the manufacture of sisal bags within the Colony cannot be undertaken without a licence issued under the Ordinance.

VII.—Other Economic Activities.

ENTREPÔT TRADE.

For geographical reasons the ports of Kenya serve as ports of exit and entry for a substantial amount of the trade of neighbouring British territories, and of parts of the Belgian Congo.

Uganda lies inland of Kenya and almost the whole of its external trade passes over the Kenya and Uganda Railway, which is its only convenient line of communication with the world markets. Apart from this purely transit trade there is a considerable trans-frontier traffic in local produce. During 1933 the estimated value of local produce sent from Kenya to Uganda amounted to £117,303, the principal commodities involved being wheat-meal and flour, maize-meal and flour, living animals for food, common soap, tea, butter, beer, bacon, ham, and timber.

For the north-eastern parts of Tanganyika, Mombasa is the most convenient port of exit and entry and a good deal of Tanganyika produce is exported by this route. As in the case of Uganda, there is a considerable trans-frontier trade in local produce. The estimated value of Kenya produce exported to Tanganyika in 1933 was £113,487 and local produce of Tanganyika to an estimated value of £138,322 was imported for consumption in Kenya and Uganda.

The Customs Agreement of 1927, whereby the free interchange of imported goods between Kenya, Uganda, and Tanganyika is allowed, has stimulated this class of trade, which now assumes very considerable proportions, the value of imported merchandise transferred from Kenya and Uganda to Tanganyika Territory during 1933 amounting to £499,810 including specie valued at £123,045 and the total customs duty collected by the Kenya and Uganda Customs Administration and transferred to Tanganyika under this agreement amounting to a total of £94,611.

Traffic in imported goods in the reverse direction was valued at £86,647 (including specie valued at £40,100), the customs duty involved being £7,177. Tanganyika produce passing through Kenya for shipment at Mombasa amounted in value to £525,355.

TOURIST TRAFFIC.

The tourist traffic of Kenya is an item of fluctuating importance. Before the recent depression the visits of wealthy tourists generally in search of sport brought substantial sums into the Colony. A special representative of the Kenya and Uganda Railways and Harbours is established in the East African Dependencies Trade and Information Office to further the tourist traffic in the two territories. Messrs. Thomas Cook and Son, Limited, have also recently established offices in Nairobi and Mombasa.

VIII.—Communications.

The main artery of communication in Kenya is the Kenya and Uganda Railway, a Government railway owned jointly by the Kenya and Uganda Governments, of which further particulars are given in the Appendix to this Section. This railway runs from Mombasa on the coast to Kampala in Uganda through the main areas of European settlement, with a number of branches. One of these branches joins on to the Tanganyika Railways. The length of the main line from Mombasa to Kampala is 884 miles and the total length including all branches is 1,625 miles. This figure includes 91 miles of line owned by the Magadi Soda Company, but operated by the Railway Administration. It is of metre gauge throughout.

The Railway Administration is also responsible for a number of steamer services on Victoria Nyanza.

The railway system is supplemented by an extensive road system. The total length of public roads in the charge of the Public Works Department is approximately 10,500 miles. Of this some 2,457 miles are classified as principal arterial roads. Only about 723 miles have been laid down with hard surface, the remainder being earth roads which are not always passable after heavy rain.

A good deal of difficulty has been occasioned to the railway by privately-owned motor transport enterprises using the roads running parallel to the railway and "creaming" the traffic. The Carriage of Goods by Motor (Prohibition) Ordinance, 1932, which supersedes the Carriage of Goods by Motor (Control) Ordinance, passed in August, 1931, to deal with this difficulty, prohibits (subject to certain exemptions) the carriage of goods by road along certain scheduled roads running parallel to the railway.

The external communications of the Colony are conducted by sea and air. The only important harbour in the Colony is Mombasa in which is included the new port of Kilindini. The other ports, which are concerned only in the coasting trade are, in order of importance:—Lamu, Malindi, Kilifi, Vanga, Funzi, and Kipini.

The total amount of foreign-going shipping entered at Mombasa in 1933 was as follows:—

			<i>Sailing Vessels.</i>		<i>Steamers.</i>	
			<i>Number.</i>	<i>Tonnage.</i>	<i>Number.</i>	<i>Tonnage.</i>
British ...	...	...	2	611	187	785,798
Foreign ...	...	...	139	7,514	217	967,476
Total ...	...	...	141	8,125	404	1,753,274

The principal foreign ships were as follows:—

Italian ...	...	...	...	...	61
French ...	...	...	...	...	50
Japanese ...	...	...	...	...	42
Dutch ...	...	...	...	...	32
German ...	...	...	...	...	26

There is a substantial volume of coasting trade in the Colony, the total amount of shipping entered at all ports in the Colony in 1933 being as follows:—

			<i>Sailing Vessels.</i>		<i>Steamers.</i>	
			<i>Number.</i>	<i>Tonnage.</i>	<i>Number.</i>	<i>Tonnage.</i>
British ...	...	...	2,939	43,557	221	93,936
Foreign ...	...	...	12	294	32	1,693
Total ...	...	...	2,951	43,851	253	95,629

Mombasa is well served with sea communications. The Union Castle Line and the British India Steam Navigation Company, maintain monthly services of passenger steamers from and to London. The Union Castle vessels run via either the Cape or Suez.

The Messageries Maritimes from Marseilles to Madagascar call fortnightly at Mombasa, home-wards and outwards.

The Tirrenia have two lines calling monthly; one steamer running as far as Zanzibar, and back to Genoa; and the other as far as Durban, and also back to Genoa, calling at the principal ports *en route*, including those of Italian Somaliland.

The Navigazione Libera Triestina Line also maintains a north and south service with Italian ports.

The Clan Ellerman Harrison Line maintains a three-weekly service of fast cargo steamers from Liverpool; also a service from the United States of America and Canada.

The Holland Afrika Line maintains a fortnightly service from London and continental ports to South and East Africa, calling at this Port.

The Deutsche Ost Afrika Line maintains a three-weekly passenger and cargo service between Mombasa, Continental ports, and Southampton.

The Osaka Shosen Kaisha Line connects monthly with Japan.

A fortnightly mail service to Bombay and Durban is maintained by the British India Steam Navigation Company's passenger and cargo steamers. The north-bound ships connect at Bombay with the Peninsular and Oriental mail steamers to England.

A monthly passenger service is maintained with Batavia via southern ports by the Royal Packet Company of Holland.

Communication between the coastal ports of the Colony is maintained by steamers belonging to the British India Steam Navigation Line and Messrs. Cowasjee Dinshaw Brothers.

The port facilities at the old port of Mombasa are small, there being merely a small pier for lighters only. At the new port of Kilindini there is now a quay 2,872 feet long with five fully-equipped berths, capable of taking vessels 500 feet long with a draught of 30 feet.

There is no dry or floating dock or patent slipway in the harbour, but there is a slipway for small steamers.

Kenya is now served by the regular weekly air services to the Union of South Africa maintained by Imperial Airways, Ltd. The foreign service statistics for 1933 were as follows:—

	<i>Aircraft.</i>	<i>Passengers.</i>	<i>Goods, value.</i>
			£
Arrivals	477	500	18,693
Departures	460	491	109,572

The exported goods included £89,981 of bullion.

The principal air-port of the Colony is Kisumu, where there are workshops and other facilities on the aerodrome. The other aerodromes in the Colony are Eldoret, Nakuru, Naivasha, Nairobi, Voi, Makindu, and Mombasa.

On the 18th August, 1932, an air-mail service was inaugurated by Wilson Airways, Ltd., linking Nairobi with Mombasa, Tanga, Zanzibar, and Dar-es-Salaam. The service is run in connexion with the service of Imperial Airways, Ltd., from Cairo to Cape Town. From September to December, 1932, an experimental air service was operated three times weekly by the Air Survey Co., Ltd., between Entebbe and Kisumu.

APPENDIX.

The Kenya and Uganda Railways and Harbours together with certain connecting motor and lake steamer services are administered by a High Commissioner for Transport (at present the Governor of Kenya) with the advice of a Railway Advisory Council and a Harbour Advisory Board.

Annual estimates are submitted to the Advisory Council and Board and are formally approved by the Legislative Councils of both territories. The resultant profit or deficit is not, however, incorporated in the ordinary annual estimates of the territories, but is transferred to a combined net Revenue Account of the Railways and Harbours.

The estimates for 1934 as approved by the Legislative Councils of Kenya and Uganda envisage a surplus on the Railways and Motor Services of £55,685 and a loss on the Harbours of £53,205, a net surplus of £2,480, after provision has been made for all loan and sinking fund charges.

The capital of the Kenya and Uganda Railways and Harbours has been provided by loans raised on the guarantees of the territories concerned or by advances by the territories pending the raising of further loans.

Kenya (Colony and Protectorate) has guaranteed loans to the Railways, etc., of approximately £13,251,800 and in consequence provision of £805,870 to cover interest and sinking fund is included in the annual estimates of expenditure for 1934 of the Colony on account of Railway loans and is shown also as a revenue item on account of reimbursements by the Railways.

IX.—Customs Tariff.

Ordinance No. 1 of 1930 as amended by Ordinances Nos. 4 and 30 of 1931, No. 33 of 1932, and No. 24 of 1933 brought into effective operation a common tariff designed to meet the present needs and conditions in the three territories of Kenya, Uganda, and Tanganyika.

(i) *Import duties.*—There are specific duties on certain goods and *ad valorem* duties on certain other goods varying between 10 per cent. and as much as 62½ per cent. in the case of tobacco. All other goods, except those specifically exempted from duty, pay an *ad valorem* duty of 20 per cent.

Certain goods are dutiable either at specific or at *ad valorem* rates, depending upon which rate yields the higher duty.

Suspended duties at specific rates or at *ad valorem* rates varying between 10 per cent. and 20 per cent. can also be imposed on certain goods. The items involved are the protected articles, such as bacon and ham, butter, cheese, wheat, rice, ghee, sugar, timber, etc.

(ii) *Imperial Preference.*—Kenya Colony and Protectorate is included in the Conventional Basin of the Congo, and in view of the international agreements relating thereto, it is not possible to adopt a policy of Imperial Preference.

X.—Trade Representatives, etc.

His Majesty's Eastern African Dependencies Trade and Information Office (Grand Buildings, Trafalgar Square, W.C.2), was established in London in 1925, to disseminate in the United Kingdom information regarding East Africa and to stimulate its trade, by helping to introduce its products into the home market. The office is under the control of a Commissioner, who is assisted by an Advisory Committee. An agent was appointed in 1933 to deal with Publicity and Settlement.

An Imperial Trade Commissioner, under the Department of Overseas Trade, is stationed in Nairobi. His sphere includes Tanganyika, Uganda, and Zanzibar, as well as Kenya.

UGANDA.

I.—Situation, etc.

The Uganda Protectorate lies approximately between latitude 1° S. and 4° N. and longitude 30° and 35° E., in the northern part of the great Lakes region of Africa. It has no sea coast, being bounded by the Anglo-Egyptian Sudan on the north, Kenya Colony on the east, Lake Victoria and the Tanganyika Territory on the south, and the Belgian Congo on the west. The territory lies on a high plateau, the greater part lying between 3,000 and 4,000 feet, and includes parts of two great mountains, Ruwenzori and Elgon, and of three of the great lakes, Victoria, Albert, and Edward, as well as several smaller lakes lying wholly within its borders. Lake Victoria, out of which flows the Nile, is estimated to cover 26,828 square miles, nearly the size of Scotland, and is 3,726 feet above sea level.

The estimated area of the Protectorate is 94,204 square miles (60,290,560 acres) of which 13,616 are water. Only 6,396,591 acres have been alienated up to the end of December, 1933 (including 6,232,320 acres in free grants to natives under various agreements). There are no native reserves in the Protectorate, but it is understood that natives will not be disturbed in the occupancy of cultivated land.

On the 31st December, 1933, about 113,071 acres, in freehold and leasehold, had been alienated to non-natives. In addition grants of freehold to Missions, under agreements, have been issued for about 51,200 acres. The grant of freehold is now restricted to existing contracts but land may be leased from the Crown, where available in certain districts, for agricultural purposes, the normal term being 99 years at a rental of Sh. 1 per acre per annum revisable after 33 and 66 years. A limited area was granted in freehold in the early years of the Protectorate and parcels of such land occasionally come into the market.

Climatic conditions are not uniform throughout the Protectorate, but, with the exceptions mentioned below, the temperature is moderate and varies only slightly throughout the year. The mean maximum temperature for most districts averages 80° F. and the mean minimum 60° F. The highest "absolute maximum" registered during 1933 was 100°, and the lowest "absolute minimum" 41·8°. On the Ruwenzori Range there is extreme cold, with perpetual snow, while it is also cold on the slopes of Mount Elgon. In the Nile valley near Lake Albert the mean maximum temperature is 90° F. and the mean minimum 74° F.

Normally, and with local variations, two rainy seasons are experienced throughout the Protectorate, one, the "long rains," from March to the end of June; and the "short rains," in September and October (and occasionally November). The total annual rainfall in 1933 varied at different stations between about 22 inches and 90 inches.

The following are the most significant figures for 1933 recorded at the stations shown:—

Station.	Height above sea level. Feet.	Monthly		Monthly		Rainfall 1933. Inches.	Average over a period of years.	Number of years.
		Highest.	Lowest.	Highest.	Lowest.			
Kampala (Kololo Hill)	4,295	86·9° March	80·9° July	60·2° May	56·0° Aug.	42·32	48·96	2
Entebbe	3,876	84·0° Jan.	79·0° July	63·0° July	53·0° July	57·84	59·43	32
Jinja ...	3,875	90·0° Jan.	83·0° Aug.	61·0° June	53·0° Feb.	39·06	45·60	29
Masindi	3,764	94·0° May	86·7° Aug.	59·1° Oct.	49·0° March	57·37	50·31	25
Fort Portal	5,050	83·9° Feb.	80·5° Oct.	51·0° Sept.	46·0° Oct.	57·71	56·88	30
Mbarara	4,800	86·2° Oct.	83·0° Dec.	55·9° May	51·4° July	31·52	45·78	26
Kabale ...	6,136	84·6° Aug.	77·4° Dec.	48·8° May	41·8° July	36·65	35·30	12
Masaka ...	4,200	84·6° Oct.	80·9° July	59·3° March	56·8° Oct.	52·37	42·28	30

II.—Population, etc.

The African peoples of the Protectorate, numbering 3,536,267 in the census of 1931, and estimated to number 3,604,135 on 31st December, 1933, are broadly divisible into three racial groups—Bantu, Nilotic, and Hamitic. The most numerous are the Bantu tribes (including the important Baganda tribe) who live in the country south and west of the Victoria Nile and certain other districts of the Protectorate. The principal Nilotic tribes live the north of the Protectorate, while the Eastern Province contains the most important of the Hamitic tribes.

The estimated numbers of non-natives in the Protectorate at the end of 1933 were: Europeans 1,854, and Asiatics 14,204.

Their occupations were classified as follows:—

	Europeans. Per cent.	Asiatics. Per cent.
Trade and Commerce ...	17·3	77·5
Industry ...	5·3	10·7
Government Service ...	33·0	9·3
Professional ...	37·0	2·3
Agriculture ...	7·4	0·2

The percentages given are based on the figures obtained from the 1931 census, but there is no reason to suppose that the various proportions have subsequently varied considerably.

The estimated numbers of natives employed in various occupations were approximately:—

Agriculture ...	833,000
Manufactures ...	45,000
Commerce ...	30,000

The approximate numbers of natives in *paid* employment in 1933 were:—

- (a) Government employment—
 - (i) Railways, 1,905.
 - (ii) Public works, 8,452.
 - (iii) Other, 11,669.
- (b) Other industrial manufactures, 20,107.
Building (excluding Government), 1,505.
- (c) Domestic service, 6,047.

No accurate estimate of the number of natives in paid agricultural employment is available, but the number is large.

III.—Finance.

A.—CURRENCY AND BANKING.

The unit of currency in Uganda is the East African shilling, divided into 100 cents. The coins in circulation are 1 shilling and 50 cents (silver), 10 cents, 5 cents and 1 cent (nickel).

Notes are in circulation of the following denominations:—Shs.5, 10, 20, 100, 200, 1,000 and 10,000.

The notes and coinage are issued by the East African Currency Board and the exchange value of the currency is maintained at a parity with sterling by the operations of that Board.

2. Three British Banks maintain branches in the territory, namely:—

- Barclays Bank, Limited (Dominion, Colonial, and Overseas)—Kampala, Jinja.
- The Standard Bank of South Africa, Limited—Kampala, Jinja.
- The National Bank of India, Limited—Kampala, Entebbe, Jinja.

The Government Savings Bank, under the control of the Post Office, had at the end of 1933 135 European, 1,059 Asiatic, and 3,514 native depositors, the total having increased during the year from 3,740 to 4,708.

The total deposits were £56,282 in 1933, as compared with £44,802 in 1932.

B.—PUBLIC FINANCE.

(1) *Public Debt.*

The Protectorate's public debt amounts to £2,235,600 in respect of loans authorized under the Specific Loan Ordinance of 1932. This includes monies for the Kenya and Uganda Railways for whose debt charges the Railways and Harbour Administration is liable to the Uganda Government.

The loans are to be appropriated as follows:—

	£
Amounts required to repay Loans from His Majesty's Government	1,087,971
Jinja-Kampala Railway	523,000
Kampala Water Supply	122,029
Western Province Roads	260,000
Human Trypanosomiasis Institute	25,000
Kampala Industrial Fuel Supply	20,060
Substitution of iron for wooden telegraph poles	17,000
Drilling and Water Supply Schemes	55,000
	£2,110,060

The full amount authorized has been raised by the issue of £2,000,000 5 per cent. stock in January, 1932, and £235,600 3½ per cent. stock in February, 1933.

The interest payable on these loans amounts to £108,246. Contributions to the sinking funds commence on the 1st September, 1935, in respect of the £2,000,000 Loan. The Railway Administration will contribute at the rate of 1 per cent. to the Sinking Fund on its share of the Loan (£882,905), and will place any further sums to a Supplementary Sinking Fund as and when funds are available. The Protectorate contribution to the Sinking Fund will be at the rate of 1·407 per cent., which is estimated to be sufficient to repay the balance of the liability (£1,117,905) at the time of maturity. Contributions to the Sinking Fund for the £235,600 Loan commence on the 15th August, 1936, at the rate of 2·017 per cent.

By the repayment to His Majesty's Government of the sum of £1,087,697, all the Protectorate's previous public debt has been extinguished. The Uganda Government has accepted a contingent liability in respect of the service of part of a loan of £3,393,477 raised by the Government of Kenya for the Kenya and Uganda Railways and Harbours.

(2) *Revenue.*

(A) *Analysis of Revenue on basis of 1934 Approved Estimates.*

Self-balancing Departments.

	Revenue.	Expenditure.
	£	£
Jinja Water Supply	3,400	2,837
Kampala Water Supply	10,600	8,852
Posts and Telegraphs	46,680	49,135
	£60,680	£60,824
Net Deficit ...	£144.	

General Revenue.

	£	Percentage.
Customs and Excise	330,000	25·4
Licences and other internal Revenue ...	723,000	55·6
Fees of Court or Office	111,555	8·6
Revenue from Government Departments	73,410	5·6
Interest	46,000	3·5
Miscellaneous	17,500	1·3
	1,301,465	100·0
Revenue from self-balancing Departments set-off against Expenditure	60,680	
Receipts from Colonial Development Fund	815	
	£1,362,960	

(B) Analysis of Customs Revenue.

Uganda and Kenya form a single unit for purposes of Customs. The gross Customs revenue actually collected in 1933 amounted to £993,043 of which Uganda received £307,992 gross with a net revenue of about £291,015 after deducting proportionate expenses. For further particulars see the memorandum on Kenya.

(3) Analysis of Expenditure on basis of 1934 Approved Estimates.

	£	Percentage.
Deficit on self-balancing Departments ...	144	0·01
Debt charges	108,246	8·33
Administration	507,548	39·07
Economic Development	218,643	16·83
Social Services	331,309	25·51
Defence	52,041	4·01
Non-effective Charges	81,000	6·24
	£1,298,931	100·0
Expenditure of self-balancing Departments set-off against Revenue	60,680	
Expenditure on account of Colonial Development Fund	783	
	£1,360,394	

(4) Reserve Funds, etc.

At the beginning of 1934 Uganda possessed a Reserve Fund of £433,857 and surplus balances amounting to £780,548 giving a total of £1,214,405.

(5) Grants-in-aid, etc.

No grant-in-aid has been given to Uganda since 1915.

The following free grants have been made from the Colonial Development Fund: £12,161 for wireless facilities at Kampala in connexion with the Cape to Cairo Air Service; £3,332 for anti-tsetse-fly measures: £1,007 for additional quarters at the Wireless Station, Kampala; and £2,000 for a geophysical investigation of the Lake Albert basin. The account in respect of the first of these projects has now been closed, and work on the last has not yet begun. In addition to the free grants mentioned, the following two schemes have received partial assistance from the Fund: £500 for the training of a Forestry Utilization Officer and £657 for the Veterinary Scholarships Scheme. These comprise all grants from the Fund from 1930 in which year the first grant was made, up to the end of 1933.

IV.—Trade Statistics.

The trade statistics of Uganda and Kenya are kept in a single document and it is not possible to give the imports or exports of Uganda separately. The combined figures are shown in the Kenya Memorandum, but the details of the principal domestic exports from Uganda without countries of destination and of the principal imports into Uganda for home consumption without countries of origin are given below.

EXPORTS.*Principal Exports of Domestic Produce, 1933.*

Article.	Unit.	Quantity.	Value. £
<i>Class I.</i>			
Coffee, raw	cwt.	100,444	210,638
Sugar, refined	tons	7,211	128,802
Tobacco:—			
Tobacco, manufactured and unmanufactured	lb.	480,135	17,750
Cigarettes	„	49,890	13,378
<i>Class II.</i>			
Cotton, raw	Centals of 100 lb.	1,179,315	2,682,210
Cotton Seed	ton	81,274	262,539
Tin Ore	„	428	57,503
Sesame Seed	„	2,659	30,382
Hides and Skins:—			
Hides	cwt.	13,325	20,196
Skins, Sheep, Goat, and other... ..	No.	79,774	2,167
Ivory, Elephant... ..	cwt.	522	13,290

Principal Exports of Domestic Produce, 1933—continued.

<i>Article.</i>						<i>Unit.</i>	<i>Quantity.</i>	<i>Value.</i> £
<i>Class V.</i>								
Gold Bullion	...	...	...	...	...	oz. troy	1,083	6,352
<i>Miscellaneous.</i>								
All other Articles	...	...	...	...	...	—	—	19,403
								3,464,610

IMPORTS.

Principal Imports for Home Consumption, 1933.

<i>Article.</i>						<i>Unit.</i>	<i>Quantity.</i>	<i>Value.</i> £
<i>Class I.</i>								
Tobacco:—								
Cigarettes	...	...	...	...	...	lb.	81,327	19,915
Manufactured...	...	...	...	...	...	"	428,251	61,478
Unmanufactured	...	...	...	...	...	"	85,791	4,176
								595,369
								85,569
Rice	...	...	...	...	...	cwt.	32,807	18,795
Whisky, rum, brandy and gin...	...	...	...	...	...	gal.	10,479	12,710
<i>Class III.</i>								
Cotton Manufactures—								
Piece-goods—								
Grey, unbleached	...	...	...	...	...	lin. yd.	7,840,425	71,408
Bleached	...	...	...	...	...	"	2,096,822	22,928
Printed—								
Khangas	...	...	...	...	...	"	42,906	883
Other	...	...	...	...	...	"	3,581,582	36,269
Dyed in the piece	...	...	...	...	...	"	2,745,326	58,144
Coloured	...	...	...	...	...	"	7,145,139	99,797
Blankets	...	...	...	...	...	—	608,555	36,205
Thread	...	...	...	...	...	lb.	41,182	5,119
Other kinds	...	...	...	...	...	—	—	7,118
								337,871
Oils—								
Motor spirit	...	...	...	...	...	gal.	1,687,123	66,101
Illuminating	...	...	...	...	...	"	664,498	21,076
Lubricating	...	...	...	...	...	"	162,691	17,694
Fuel	...	...	...	...	...	"	293,918	4,257
								2,808,230
								109,128
Motor cars, etc., and parts—								
Motor cars	...	...	...	...	...	—	170	19,987
Motor car parts and accessories	...	...	...	...	...	—	—	16,082
Motor lorries	...	...	...	...	...	—	224	28,009
Motor lorry parts and accessories	...	...	...	...	...	—	—	3,294
Motor tractors	...	...	...	...	...	—	5	303
Motor tractor parts and accessories	...	...	...	...	...	—	—	307
Tyres and tubes	...	...	...	...	...	cwt.	18,098	34,165
								102,147
Machinery (all kinds)						tons	923	59,673
Iron and steel manufactures	...	...	...	...	...	"	3,643	58,826
Jute—								
Bags and sacks	...	...	...	...	...	doz.	166,992	43,923
Bagging and sacking	...	...	...	...	...	yd.	1,099,012	10,057
								53,980
Cutlery, hardware, instruments and im- plements						—	—	50,942
Artificial silk piece-goods	...	...	...	...	...	lin. yd.	2,447,534	35,446
Paper and cardboard manufactures	...	...	...	...	...	—	—	27,004
Apparel and hosiery	...	...	...	...	...	—	—	24,016
Miscellaneous—								
Parcel Post	...	...	...	...	...	—	—	56,670
All other articles	...	...	...	...	...	—	—	279,822
								1,312,599
Total								

In addition Bullion and Specie on private account to the value of £54,450 was transferred from Tanganyika Territory.

The value of Kenya produce imported into Uganda for consumption during 1933 was £117,303.

The value of Uganda produce exported to Kenya for consumption in the Colony during 1933 was £74,672.

V.—Natural Resources.

A.

1. AGRICULTURE.

The resources of the Protectorate are principally agricultural. Agriculture, including the rearing of live-stock, is the principal occupation of both natives and European settlers.

In 1933 of the total area of about 4,681,930 acres under cultivation by natives much the greater part (approximately 3,500,000 acres) was under food crops for purely domestic consumption; 1,091,000 acres were under cotton, and the rest under such products as coffee, tobacco, maize, rice, chillies, sugar-cane, etc.

The prosperity of Uganda has been closely bound up with the cotton crop and the extension of roads and railways, expansion of towns and development generally can be accounted for by the rapid progress made in this industry during the past 20 years. With the exception of India, Uganda is the largest cotton-growing country within the Empire. Of late years, however, the danger of Uganda remaining a one-crop country has been realized and the natives have been encouraged to grow other crops, such as coffee, tobacco, etc., for export.

The chief crops grown by Europeans in the Protectorate are coffee, tobacco, tea, and rubber. Of the 101,949 acres of European estates in 1933, 14,617 acres were under coffee, 9,534 were under para rubber, 855 under tea, 37 under tobacco, 91 under cotton, and 341 miscellaneous. The largest areas of European cultivation were in the Mengo District (Buganda Province), 14,194 acres; in the Toro District (Western Province), 3,145 acres; in the Bunyoro District, 2,983 acres; and in the Entebbe District (Buganda), 2,277 acres.

In 1933 the area in occupation of Indians, etc., was 42,512 acres consisting of 46 estates with 14,863 acres under cultivation. Of this area 11,015 acres were under sugar, 1,180 acres under para rubber, 2,100 acres under sisal, 681 acres under coffee (250 *Arabica* and 431 *Robusta*) and 87 acres under miscellaneous crops.

Agricultural production in the Protectorate is subject to certain general handicaps. Climatic conditions are often erratic, for example, the rains may come too early or too late; the crops are also liable to attacks from pests and diseases of various kinds. The Protectorate is liable to periodical visits by locusts, the extermination of which presents great difficulties.

A further difficulty is the heavy expense of transport for exports, due to the long haul to the seaboard and the addition to sea freights due to the Suez Canal charges. In view of this the principal export crops which have been developed are those of which the value per unit of weight is high.

The greater part of native agricultural production is of foodstuffs for local consumption. The crops of importance for export are as follows:—

Cotton is the principal export product of the Protectorate. It is almost exclusively grown by natives on many thousands of small plots scattered throughout the country. It is grown throughout the Eastern, Buganda, and Northern Provinces and in the Toro and Ankole Districts of Western Province. The crop is planted during the months May to September and is marketed during the early months of the following year. Figures of acreage and production during the last few years are given below.

Season.	Acre.	Exports in Bales of 400 lb.	Value of exports at Mombasa during Calendar year. £
1929-30	633,157	129,122	1,555,344
1930-31	739,690	188,920	1,503,307
1931-32	865,259	207,326	1,584,172
1932-33	1,071,410	294,828	2,682,210
1933-34	1,090,502	277,000 (Estimated).	—

Owing to unfavourable climatic conditions in certain areas it is not anticipated that the 1934-35 crop will exceed 220,000 bales.

Many thousands of English-made ploughs are in use by natives in the Eastern Province and the numbers increase yearly but there are extensive areas where for a variety of reasons ploughing is not practicable. The quality of cotton is maintained by careful control of the seed supply. The staff of the Department of Agriculture is continually at work on this important branch of the industry. Seed for planting is requisitioned by Government from the various ginneries and issued, free of charge, to growers. The cotton grown is of the American upland type, which commands a substantial premium over American middling. The Government has established two cotton-selection stations where improved varieties are produced, tested, and subsequently introduced into general cultivation. Marketing facilities are well organized. Prior to the opening of the 1934 cotton buying season the cotton growing areas of the Protectorate were divided into Zones and the movement of seed cotton out of the Zones so created was prohibited. Provision was made in the zoning legislation for the fixing by Government of minimum prices payable to growers and for the fixing of a maximum charge for the ginning and baling, by ginneries, of seed cotton owned by middlemen.

The object of this legislation is to retard the spread of insect and fungus pests, more particularly pink bollworm and to prevent the mixing of cottons of different staple lengths and quality. It is hoped also that, while the zoning policy has been adopted primarily for Agricultural and pest reasons, ginneries will be afforded an opportunity to re-organize and effect economies in the marketing and ginning of the crop. There are 194 ginneries in the Protectorate. The whole crop of lint is exported.

With the extension of railway facilities within the Protectorate the economic zone for the exports of cotton-seed has been widened. The average f.o.b. value per ton of cotton seed exported during 1933 was £3 5s. 0d. compared to £3 0s. 0d. during 1932, and exports amounted to the record figure of 81,274 tons compared to 56,311 tons in 1932. Both value and exports fell heavily in 1934. Exports of cotton-seed during recent years are as under:—

Year.	Quantity. Tons.	Value. £	Year.	Quantity. Tons.	Value. £
1929	67,523	424,000	1932	56,311	168,366
1930	33,578	137,387	1933	81,274	262,539
1931	45,435	149,224	1934	30,000 (Estimated).	—

Coffee.—European planters have concentrated mainly on coffee and rubber, but the latter crop is not now a remunerative one. Both the Arabica and Robusta varieties of coffee are grown in areas climatically suited to the particular species. The majority of the estates are situated in those parts of the Protectorate west of the Nile, in the Buganda, Western, and Northern Provinces. Coffee cultivation is also making strides as a native industry.

The total acreage of this crop under cultivation both by non-natives and natives is estimated to be:—

			<i>Arabica Coffee.</i>			<i>Robusta Coffee.</i>		
			1931.	1932.	1933.	1931.	1932.	1933.
Non-natives	...	...	10,837	11,210	8,337	6,722	6,710	6,961
Natives	...	...	7,498	8,654	9,523	14,157	16,831	17,260
			18,335	19,864	17,860	20,879	22,541	24,221

In the Bugishu District where some 3,526 acres of Arabica were cultivated in 1933 by natives in small plots, steps have been taken to organize the marketing of the crop in order to secure the best price to the producer and to standardize and improve the quality of the exports. It is hoped that in time a co-operative marketing society will be formed. Pulping stations at convenient centres in the District and a central coffee factory have been erected.

Other important coffee districts are Ankole, with some 2,477 acres in 1933 grown by peasant farmers; the Toro District, where 3,027 acres of Arabica were cultivated by Europeans; and the Mengo District, where 6,634 acres of Arabica and Robusta combined were cultivated by Europeans. In all areas where coffee is grown by peasant farmers the Government maintains central and district nurseries where plants from selected seed are raised and issued free of charge to growers.

Exports of coffee have been:—

Year.	Quantity. Cwt.	Value. £	Year.	Quantity. Cwt.	Value. £
1929	41,192	117,135	1932	87,077	223,162
1930	48,856	154,996	1933	100,444	210,638
1931	69,990	161,389			

Tobacco is grown both by natives and Europeans. The greater portion of the crop grown by the former is purchased by the British American Tobacco Company for use at its factory at Jinja, but steps are being taken to explore the possibilities of the overseas markets.

In Bunyoro District the growing of tobacco by natives is making steady progress. The Government supervises the crop throughout all stages of growth from the establishment of seed-beds, to the curing, grading, and marketing of the leaf. The native-grown area amounted to 1,685 acres in 1933. The total European acreage in Bunyoro was 31. A packing factory has been established at Masindi where the tobacco is graded, conditioned, and packed for export.

The production of cigarettes and manufactured tobacco in 1933 was:—

	lb.
Cigarettes	187,332
Manufactured Tobacco	75,700

The exports were 49,890 lb. and 10,385 lb. respectively. In addition 469,750 lb. of unmanufactured tobacco were exported. A very large proportion of the exports were to Kenya and Tanganyika.

The exports of tobacco for the last five years have been:—

Year.	Quantity. lb.	Value. £	Year.	Quantity. lb.	Value. £
1929	62,081	3,066	1932	227,447	26,160
1930	144,367	10,949	1933	530,025	31,128
1931	180,071	17,530			

Rubber.—About 9,534 acres were under rubber grown by Europeans in 1933, but owing to low prices little tapping has taken place lately and the export of this product decreased from 280 tons valued at £16,814 in 1930 to 60 tons valued at £2,291 in 1931 and ceased altogether in 1932. The increase in the price of rubber in 1933 was followed by the recommencement of tapping on several estates, but there were no exports during the year.

Tea.—An increasing interest in the cultivation of tea is being shown by non-native planters and the acreage increased from 360 in 1930 to 855 acres in 1933. The export has grown from 26 cwt. value £130 in 1931 to 269 cwt. value £1,355 in 1933, but the production of tea will, in the main, be aimed to meet the requirements of the local market. 65,608 lb. of tea were produced in Uganda during 1933 of which 30,128 lb. were exported, the balance being for local consumption. In 1934 a scheme recommended by the Conference of East African Governors and approved by

the Secretary of State for the restriction of tea planting in East Africa will come into operation. So far as Uganda is concerned the scheme will provide that new plantings shall not exceed a maximum of 2,000 acres by the 31st March, 1938.

Sugar.—A large estate and factory in the Mengo District at Lugazi has been developed by an Indian firm. The factory has a distillation plant for the production of power-alcohol. A second sugar factory is situated at Kakira in the Busoga District. The total acreage cultivated by Asiatics under sugar-cane was estimated to be 10,997 acres in 1933. Sufficient white sugar is produced to satisfy all local requirements and the surplus is exported to the surrounding territories. The total manufacture of sugar by the two Uganda factories during 1933 was 15,096 tons, of which 7,211 tons were exported, mostly to Kenya and Tanganyika.

The exports were as follows:—

Year.	Quantity. Cwt.	Value. £	Year.	Quantity. Cwt.	Value. £
1929	4,276	7,071	1932	41,049	45,012
1930	6,669	8,719	1933	144,229	128,802
1931	44,995	46,576			

Sisal.—An estate of 5,000 acres, of which 2,100 acres have been planted, is being developed under this crop in Bunyoro.

Food Crops.—The areas under the principal food crops were in 1933 (approximately):—

	Acres.		Acres.
Plantains	872,719	Beans and Peas	371,792
Milletts	1,104,287	Simsim (Sesame)	201,746
Sweet Potatoes	496,526	Groundnuts	126,123
Cassava	328,246		

Plantains and sweet potatoes are the staple foods in the Buganda Province, and millets and cassava in the drier parts of the Eastern Province. These foodstuffs are the foundation of the native economy and in Buganda the natives attach great importance to the maintenance of the banana plantations. In the grain districts there are local central granaries for the storage of grain, chiefly *eleusine coracana*, against time of famine.

There is little export of any of these crops except groundnuts and sesame, of which there is a small and varying surplus for export. The Government has decided, however, to encourage the production of groundnuts for export and it is anticipated that exports will increase during the next few years. The exports of groundnuts were 215 tons in 1931, 1,445 tons in 1932 and 325 tons in 1933; of sesame 350 tons plus 320 gallons of oil in 1931, 3,597 tons plus 688 gallons of oil in 1932, and 2,659 tons plus 2,059 gallons of oil in 1933.

The only other export of any importance of native-grown products is that of *chillies*. About 800 acres were under this product in 1933; exports which were 6,174 cwt. (value £26,133) in 1929, fell to 2,791 cwt. (£3,947) in 1933.

Other potential export crops with which the Department of Agriculture is experimenting are shea nuts, essential oil crops such as geranium, lemon-grass and patchouli, oil palms, sunn hemp, and manilla hemp.

2. FORESTRY.

The total forest area is calculated to be 2,844 square miles, of which 1,811 square miles are estimated to be merchantable, and 1,033 square miles unprofitable or inaccessible.

There are four areas of Mvule savannah and one forest area in Budongo being exploited by private enterprise under licence, totalling over 123 square miles in 1933.

There are several thousand acres of Mvule savannah still available for exploitation in Busoga and large areas of accessible tropical rain forest in various parts of the Protectorate. The policy of Government is to encourage the exploitation of existing stocks of Mvule as rapidly as possible and to replace scattered savannah by a smaller area of well-stocked plantations.

With regard to the tropical rain forest, the policy is to encourage exploitation after the preparation of provisional working plans.

The most valuable of these forests at present accessible is the Budongo Forest in Bunyoro of approximately 89,000 acres in extent. It contains large quantities of mahogany (*Khaya anthotheca*—"Munyama" and *Entandrophragma utile*—"Moivu") of very fine quality in addition to other valuable timber species.

A provisional working plan for this forest has been prepared and applications to exploit it are being called for.

It is probable that a profitable timber industry could be built up by a company competent to develop the resources of this forest.

The out-turn of produce from Crown forests during 1933 was as follows:—

Description of Produce.	Sold.		Free.		Total.	
	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £
Timber Cub. ft.	213,403	5,089	30,849	704	244,252	5,793
Poles No.	27,416	437	15,730	182	43,146	620
Firewood, stacked Cub. ft.	4,740,185	4,435	125,593	94	4,865,778	4,528
Charcoal "	12,093	363	500	15	12,593	378
Seeds lb.	17	7	202	58	219	65
Plants No.	23,418	65	42,534	119	65,952	184
Miscellaneous ... No.	—	73	—	1	—	74
		10,469		1,173		11,642

The timber output for the year 1933 compared with the two previous years was as follows:—

	1931.		1932.		1933.	
	Cub. ft.	Value. £	Cub. ft.	Value. £	Cub. ft.	Value. £
Timber purchased by Concessionaires	67,093	2,548	70,469	2,121	72,944	1,564
Timber purchased on Permits	49,155	1,961	60,315	2,011	140,459	3,525
Timber issued free to Government Departments	13,685	274	2,023	46	—	—
Timber issued free to Natives	4,874	228	14,134	520	17,157	428
Timber issued free to Missions	12,695	417	8,106	197	13,692	276
	147,502	5,428	155,047	4,895	244,252	5,793

The export trade improved in 1933, the total being 42,359 cub. ft. value £4,601, as compared with 14,207 cub. ft. value £3,406 in 1932. This satisfactory increase is an indication of Uganda sawmill development and appreciation of Uganda timbers in East Africa. Overseas export, consisting entirely of Uganda Iroko (*Chlorophora excelsa*), also increased by a further 3,312 cubic feet.

A certain amount of soft wood (*Podocarpus* from Kenya and cheap deals from Northern Europe) was imported in 1933, but Uganda has sufficient supplies of her own to be completely self-supporting if necessary. Two of her light hardwoods (*Maesopsis Eminii* and *Alstonia congensis*) have now been tested at the Forest Products Research Laboratory in England.

3. ANIMAL HUSBANDRY.

Stock in Uganda is almost entirely native-owned, although Europeans are now developing a localized dairy industry which promises to be of a thoroughly satisfactory nature. The methods employed by the native stock-owners are still primitive in character and the existing organization in relation to the care of herds, etc., is largely based on custom.

The Veterinary Department, however, is gradually improving conditions, and in particular exercises a close supervision in all matters relating to the eradication and control of stock diseases and the measure of success achieved is reflected in the fact that the number of cattle in the Protectorate increased from 1,000,000 to approximately 2,000,000 during the 10 years between 1921 and 1931. Notable efforts have been made to restrict the incidence of rinderpest, and the Department is further much occupied with anti-tsetse-fly work.

The Veterinary Department is also concentrated upon the improvement of indigenous breeds of cattle.

Uganda is practically self-supporting in all animal products and could easily be made entirely so. The internal trade in cattle is of fairly substantial proportions but the price of cattle is low. The hide and skin industry has suffered from the low prices ruling in the world's markets, and the following table indicates the decrease in production.

		Exports.				
		1929.	1930.	1931.	1932.	1933.
		Quantity, Cwt.	Quantity, Cwt.	Quantity, Cwt.	Quantity, Cwt.	Quantity, Cwt.
Hides	Value	35,099	21,493	19,789	15,222	13,325
	Value	£152,543	£49,519	£36,696	£27,682	£20,196
Skins	Quantity, No.	258,045	205,200	131,247	173,509	79,700
	Value	£12,901	£7,670	£5,268	£6,626	£2,150

Steps have been taken to organize the ghee and butter industry in the Eastern Province. During 1932, 1,716 cwt. of ghee (value £5,215) were imported into the Protectorate and in 1933 the imports were 719 cwt. (value £1,733). The figures in respect of butter imports are as follows:—

	Cwt.	£
1931	726	6,075
1932	186	1,367
1933	202	1,198

The fall in import figures shows that the results are distinctly promising.

The latest estimate of the live-stock population of the Protectorate at the end of 1933 is approximately as follows. (It is not possible to give European-owned cattle separately from native-owned).

Cattle	2,106,890	Donkeys	15,140
Sheep	869,535	(15,000 of these are in the Karamoja District).	
Goats	2,069,300	Horses	9
Swine	1,000 (Estimated).	Mules	3

4. MINERALS.

A Geological Survey of the Protectorate is in progress and approximately one-seventh of the area of the territory has been geologically surveyed, 3,669 square miles in some detail.

Several minerals are known to exist but tin-ore and gold alone have as yet been commercially exploited and exported. Prospecting for tin, gold and copper is in progress. On 31st December, 1933, 49 Exclusive Prospecting Licences were in operation, covering 2,072 square miles of which 8 for 443 square miles were in Ankole, 15 for 959 square miles in Kigezi, 1 for 588 square miles in Toro, 23 for 53 square miles in Budama, 1 for 24 square miles in Bunyoro and 1 for 5 square miles in Busoga.

Tin is mined at Mwirasandu in Ankole, under a mining lease of 361 acres and from small workings in Ankole and Kigezi Districts where 75 and 28 non-precious mineral claims respectively were current on 31st December, 1933. Tin-ore has been exported as follows:—

			<i>Mwirasandu.</i>	<i>Other sources.</i>	<i>Value.</i>
			tons.	tons.	£
1931	...	...	136	16	12,522
1932	...	...	351	22	37,312
1933	...	...	300	89	57,981

Gold.—Alluvial and vein deposits have been found in Kigezi, Ankole and Budama. Exports have been as follows:—

			<i>Kigezi</i>	<i>Ankole</i>	<i>Budama</i>	<i>Total</i>	<i>Value</i>
			oz.	oz.	oz.	oz.	£
1931	...	...	71	—	—	71	401
1932	...	...	586	—	—	586	3,274
1933	...	...	852	376	33	1,261	7,361

Copper.—Geophysical survey of the Kilembe (Rowenzori) prospect of the Tanganyika Concessions, Ltd., has indicated an ore strike with a possible metal content of 900,000 tons of copper.

Salt is won by native agency solely for local native consumption. Production (in long tons) in 1933 was as follows:—

						<i>Tons.</i>
From Katwe	...	...	...	...	...	1,288
Kaenyi	...	...	...	...	...	204
Kibiro	...	...	...	...	...	not available

Clay and sand are produced locally for building purposes and stone for road making; and limestone is obtainable in certain areas. Figures are not available.

5. FISHERIES.

Fisheries are mostly in native hands, and there is a certain amount of local trade in fresh and dried fish in the districts readily accessible from the shores of the principal lakes.

There are certain restrictions upon fishing in sleeping sickness areas, upon the type of vessels which may be employed and upon the mesh of the nets used, but otherwise the industry is not controlled.

A fishing survey of Lake Victoria was made by Mr. Michael Graham in 1927-28, and a report subsequently published. The Cambridge Expedition to the East African Lakes, 1930-31, also made investigations and a report on the Fisheries of Uganda by Mr. E. B. Worthington has been issued.

The number of persons engaged in the lake fishing industry is estimated to be approximately 10,000.

B.

FOOD SUPPLY.

So far as the food supply of the native population is concerned the Protectorate is self-supporting.

The Protectorate is occasionally subject to periods of famine but it has always proved possible up to date to import the necessary foodstuffs from the adjoining territory of Kenya.

Every effort is made by the Agricultural Department to increase the agricultural production of the native and particular attention is paid to the principle that increased production by the native of agricultural products for export should not be at the expense of the food supply.

VI.—Industry.

Industrial establishments are practically confined to the factories, etc., necessary for the preparation of the local agricultural products for export or for local consumption. These include:—

- (1) 194 cotton ginneries (137 working in 1933).
- (2) 2 sugar factories, one including a distillation plant.
- (3) a number of oil crushing mills.
- (4) a number of coffee factories.
- (5) a tobacco factory erected by the British American Tobacco Company, Limited, at Jinja, and several much smaller concerns.

There are also two small engine workshops run by the Kenya-Uganda Railways and a motor repair depot at Masindi.

VII.—Other Economic Activities.

(1) ENTREPÔT TRADE

Owing to its geographical position, Uganda has practically no entrepôt or transit trade, although there may be some small trade of this sort with the neighbouring parts of the Belgian Congo.

(2) TOURIST TRAFFIC.

The tourist traffic of Uganda is in normal years of some importance but it is naturally liable to fall off during periods of depression. It is not possible to give the cash value of this traffic to Uganda though it must be fairly substantial.

The attraction of Uganda for tourists lies largely in the variety and interest of its scenery and of its wild animals (including elephants, giraffes, white rhinoceros and gorillas) and certain areas have been set aside as game reserves. The animals are carefully protected under the provisions of the Game Ordinance, but game licences may be obtained at costs varying from 400s. (which is the price of shooting two elephants) to 10s. (the fee for a bird licence). In addition a visitor's 14 days Game Licence costs £15 and a visitor's full licence £50.

VIII.—Communications.

The internal communications of Uganda are by rail, water, road, and air.

Railways. Of the Kenya and Uganda Railway system, which serves both Kenya and Uganda, 332 miles lie within Uganda, consisting of 208 miles of the main line to Kampala, 100 miles from Tororo to Soroti in the Eastern Province, 17 miles from Mbulamuti to Namasagali on Lake Kioga, and 7 miles connecting Kampala with Port Bell on Lake Victoria. The railways are all of metre gauge.

Water.—The Kenya and Uganda Railways and Harbours Administration also operate Steamer Services on Lakes Victoria, Kioga, and Albert, the Albert Nile to Nimule on the Sudan border and on the Kagera River to Nyakanyassi which lies across the south-west border in Tanganyika. The principal ports served on Lake Victoria are Port Bell, Jinja, Entebbe, Bukakata, and Busungwe. On Lake Kioga the chief ports are Namasagali, Bugondo, Lalli, Sangai, Atura, and Masindi Port from which a road motor service runs via Masindi to Butiaba the chief port of Lake Albert. On Lake Albert and the Albert Nile the principal ports are Butiaba, Packwach, Mutir, Rhino Camp, and Nimule.

Roads.—Uganda is particularly well served with roads. Radiating from Kampala the road system covers practically the whole country and gives communication between all the principal centres. The roads, which are for the most part constructed of murram, or ironstone, are narrow, but are well constructed and maintained, and all the main routes are suitable for motor traffic at all seasons. At the end of 1933 there were 1,895 miles of roads in the Protectorate classified as—

Class I	... 1,037 miles	Class II	... 574 miles	Class III	... 284 miles
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In addition there were 5,260 miles of roads, built and maintained by the Native Administrations, suitable in most seasons for motor traffic up to two and a-half tons gross weight.

Trunk roads from Kampala run

- (a) east via Jinja and Busia to Kenya Colony and thence northward via Tororo, Soroti, Lira and Kitgum to the Sudan;
- (b) north via Masindi to Butiaba on Lake Albert;
- (c) north-west via Mebende to Fort Portal;
- (d) south-west via Masaka, Mbarara and Kabale to Rutchuru in the Belgian Congo.

There is a good road connecting Fort Portal with Mbarara, with a branch road via Katwe salt lake to the Congo border near Kasinde.

The tin-mining area round Mwirasandu is connected with Nyakanassi Port on the Kagera River, and with Mbarara, and there is a branch road from Mwirasandu to the Ruanda—Irundi border.

Communication with the Belgian Congo is also established by a road from Rhino Camp on the River Nile via Arua to Aru.

Air communications in Uganda are maintained by Imperial Airways, Entebbe being a point of call on the South African air route. There are also landing grounds at Jinja, Tororo, Gulu, Masindi and Mbarara. The foreign service statistics for 1932 were as follows:—

	Aircraft.	Passengers.	Goods Value.
			£
Arrivals	121	91	1,553
Departures	121	106	9,488

The exported goods included £7,365 of bullion.

External communications are mainly by the Kenya and Uganda Railway to Mombasa and thence by sea; but a small traffic passes by lake steamers and road to the Belgian Congo and the Sudan, while the steamer service on Lake Victoria connects with the Tanganyika railway system at Mwanza.

IX.—Customs Tariff.

Ordinance No. 1 of 1930 brought into effective operation a common tariff designed to meet the present needs and conditions in the three territories of Uganda, Kenya and Tanganyika.

(i) IMPORT DUTIES.

There are specific duties on certain goods and *ad valorem* duties on certain other goods varying between 10 per cent. and as much as 62½ per cent. in the case of tobacco. All other goods, except those specifically exempted from duty, pay an *ad valorem* duty of 20 per cent.

Certain goods are dutiable either at specific or at *ad valorem* rates depending upon which rate yields the higher duty.

Suspended duties at specific rates or at *ad valorem* rates varying between 10 per cent. and 20 per cent. can also be imposed on certain goods, but, so far as Uganda is concerned, are imposed at present on bacon and ham and wheat only. The items involved are the protected articles such as bacon, ham, butter, cheese, rice, wheat, ghee, sugar, and timber, etc.

(ii) IMPERIAL PREFERENCE.

Uganda is included in the Conventional Basin of the Congo, and in view of the international agreements relating thereto, it is not possible to adopt a policy of Imperial Preference.

X.—Trade Representatives, etc.

His Majesty's Eastern African Dependencies Trade and Information Office (Grand Buildings, Trafalgar Square, London, W.C.2), was established in London in 1925 to disseminate in the United Kingdom information regarding East Africa and to stimulate its trade by helping to introduce its products into the home market. The Office is under the control of a Commissioner, who is assisted by an Advisory Committee.

An Imperial Trade Commissioner, under the Department of Overseas Trade, is maintained at Nairobi and is responsible for Uganda, Kenya, Tanganyika, and Zanzibar.

TANGANYIKA TERRITORY (MANDATED TERRITORY).**I.—Situation, etc.**

Tanganyika Territory (Mandated Territory) consists of that part of former German East Africa which is administered under a Mandate by His Britannic Majesty. The Territory lies between the Great African Lakes and the Indian Ocean, approximately from latitude 2° to latitude 11° South and longitude 30° to longitude 40° East. Its neighbours are Kenya and Uganda on the north, the Belgian Congo on the west, Northern Rhodesia and Nyasaland on the south-west and Portuguese East Africa on the south-east.

Along the coast lies a plain, varying in width from 10 to 40 miles, behind which the country rises gradually to a plateau constituting the greater part of the hinterland. This plateau falls sharply from the general level of 4,000 feet to the level of the lakes (Tanganyika 2,590 feet, Nyasa 1,607 feet) which mark the great Rift Valley extending northwards to Lake Naivasha (Kenya). The highest points in the Territory are in the north-east, where are the extinct volcanoes, Kilimanjaro, which rises to 19,720 feet and is snowcapped, and Mount Meru (14,960 feet). In the south-west are the Livingstone Mountains where the highest peak is over 9,000 feet.

Portions of Lake Victoria, the eastern shores of Lake Tanganyika and the northern and north-eastern shores of Lake Nyasa are included in the Territory. A number of rivers flow into the Indian Ocean or into one of the three lakes but they are for the most part not of any importance for purposes of navigation. The most important are the Rovuma (the southern boundary) the Rufiji and its tributaries, the Ruaha and the Kilombero, and the Pangani, which rises on Mount Kilimanjaro.

There are two main highland areas, in the north-east around Moshi and Arusha and in the south-west in the Iringa Province, and it is in these areas that the principal European development has taken place. Most of the land is in native occupation, but there are no "Native Reserves" so-called.

The total area is about 360,000 square miles (230,400,000 acres); the land surface is about 217,527,232 acres (say 339,000 square miles), of which 2,642,519 acres are alienated. A large, but at present undetermined, part of the "unalienated" land is occupied and cultivated by the natives as tribal lands. Forest areas are:—reserved forests, 2,517,741 acres; forest awaiting reservation 67,053 acres; privately-owned forest 40,000 acres.

Climatic conditions vary very considerably in different parts of the territory; the main features are the warm and rather damp coast region (average yearly temperature 78° F.) up to 300 feet above sea level; the moderately warm and moist zone of the eastern slopes of the ranges which bound the central plateau (1,600-6,500 feet) the cool and moist zone of the sub-alpine heights (6,000 to 10,000 feet) and the cold and dry alpine zone above 10,000 feet.

The rainfall varies from an average of 35 inches in the sea coast areas to 97 inches in the Highlands. The rainy season varies in different parts of the territory. Three types of general climate are to be distinguished: (1) the Indian or trade-wind type, which prevails over the greater part of the country, with one rainy season (December to April); (2) the monsoon type, which prevails in the north-east, with two rainy seasons (the heavy rains from March to May, and the short rains October to November); (3) the equatorial type which prevails in the north-west, with a rainy season from October to May, divided into two parts by a short abatement about January.

The following table shows the most significant figures for 1933, at the stations shown:—

Station.	Altitude.	Monthly Maximum.		Monthly Minimum.		Rainfall.	
		Highest.	Lowest.	Highest.	Lowest.	1933.	Av. 1929-33.
		(° Fahrenheit).		(° Fahrenheit).		ins.	ins.
Dar-es-Salaam	... 30 ft.	88·7 Dec.	82·6 Aug.	77·5 Dec.	67·6 Aug.	27·9	40·6
			Sept.				
Kondoa Irangi	... 4,615 ft.	85·6 Nov.	77·0 July	63·7 Dec.	51·8 July	20·6	28·2
Dodoma	... 3,700 ft.	88·3 Nov.	78·3 July	65·5 Dec.	55·4 July	23·5	22·4
Moshi	... 2,649 ft.	91·4 Mar.	78·6 July	67·3 Apr.	60·6 June	20·9	35·5
					Aug.		
Iringa	... 5,365 ft.	82·0 Nov.	72·1 July	60·3 Jan.	51·6 July	21·4	26·9
Mbeya	... 5,600 ft.	79·7 Nov.	70·0 July	58·1 Jan.	45·3 July	39·4	38·2

II.—Population.

The following table shows the number of non-natives in the territory at the census taken in April, 1921, the comparative figures for 1931 and the estimated number at the end of 1933:—

	1921.	Percentage.	1931.	Percentage.	1933.	Percentage.
Europeans ...	2,447	14	8,228	20	8,304	22
Indians ...	9,411	54	23,422	57	30,126	78
Goans ...	798	5	1,722	4		
Arabs ...	4,041	23	7,059	17		
Others ...	741	4	589	2		
	<u>17,438</u>		<u>41,020</u>		<u>38,430</u>	

In the case of Europeans 24 per cent. of the male adults are engaged in agriculture and 17 per cent. are Government servants. Most of the Indians and Arabs are engaged in commercial and agricultural occupations. The Goans are mainly engaged in clerical work.

A census of the native population was made in 1931. It must, however, be emphasized that it is impracticable to attempt the taking of a general census as accurate and detailed as can be taken in Europe. The German census of 1913 recorded a total of 4,063,300. The following table shows the figures of the 1931 census and the estimated native population as at the end of 1933:—

	1931.		1933.
Men ...	1,484,849	Male ...	2,406,051
Women ...	1,656,387		
Children—Male ...	943,367	Female ...	2,594,109
Female ...	938,037		
Total ...	<u>5,022,640</u>		<u>5,000,160</u>

The density shown by these figures is only 14 per square mile.

Some 200,000 natives were in paid employment (110,000 in agriculture, 16,000 in mines, 21,000 in Government employ and 18,000 in domestic service).

The principal town is Dar-es-Salaam (population 30,000) the capital and chief port. Other important towns are Tanga, a port 136 miles north of Dar-es-Salaam, and the terminus of the railway from Arusha and Moshi, Tabora (population 25,000) the junction for the branch line to Mwanza on Lake Victoria, Dodoma, where the main north and south road crosses the railway and a station of the East African air route, and Moshi and Arusha, the centres of the coffee-producing area on Mounts Kilimanjaro and Meru in the Northern Province.

The number of immigrants in 1933 was:—

Europeans ...	606
Asiatics ...	654
Others ...	202
	<u>1,462</u>

There is little or no native immigration or emigration.

III.—Finance.

A. CURRENCY AND BANKING.

1. The unit of currency in Tanganyika is the East Africa shilling, divided into 100 cents. The coins in circulation are 1 shilling and 50 cents (silver), 10 cents, 5 cents and 1 cent (nickel). The notes in circulation are of the following denominations Shs.5, 10, 20, 100, 200, 1,000, and 10,000.

The estimated value of the notes in circulation on the 31st December, 1933, was £1,633,506.

The notes and coinage are issued by the East African Currency Board and their exchange value is maintained at parity with sterling by the Board.

2. Three British Banks maintain branches in the territory, namely:—

The Standard Bank of South Africa, Ltd., with branches at Arusha, Bukoba, Dar-es-Salaam, Lindi, Morogoro, Moshi, Mwanza, Tabora, and Tanga;

Barclays Bank (Dominion, Colonial, and Overseas) Ltd. with branches at Arusha, Bukoba, Dar-es-Salaam, Iringa, Mbeya, Moshi, Mwanza, Tanga, and Tabora;

The National Bank of India, Ltd., with branches at Dar-es-Salaam and Tanga.

The Banque du Congo Belge Société Anonyme is also established at Dar-es-Salaam and Kigoma.

A Government Savings Bank is also situated in the territory. On the 31st December, 1933, there were 3,154 depositors and the amount standing to their credit was £37,209.

3. The Government has no interest in any banking institutions other than the Post Office Savings Bank referred to above.

B. PUBLIC FINANCE.

1. *Public Debt.*

The public debt of Tanganyika Territory includes loans raised for the Tanganyika Railways, Ports, and Harbours, etc.

On the 31st December, 1933, the total public debt was £8,717,031 divided as follows:—£2,648,052 in respect of the Territory and £5,676,792 for the Railways, Ports and Harbours. The balance of £392,187 represents expenses of issue and discount.

The debt charges for the financial year ended 31st December, 1933, in the case of the Territory amounted to £100,208 and for the Railways and Harbours to £285,342.

The total debt charges for the period therefore amounted to £385,550. The total value of the Sinking Funds on the 31st December, 1933, was £216,311. The estimated debt charges* for 1934 are £424,994. For details regarding each loan see Appendix "A".

2. *Revenue.*

(A) *Analysis of Revenue (on basis of Estimates for the year 1934).*

Self-Balancing Departments.

	Revenue. £	Expenditure. £	Balance. £
Railway	504,862	684,697	— 179,835
Posts and Telegraphs	71,100	82,090	— 10,990
	<u>575,962</u>	<u>766,787</u>	<u>— 190,825</u>

Net deficit, £190,825.

General Revenue.

	£	Per cent.
I. Customs and Excise	457,500	29·2
II. Hut and Poll Taxes	664,000	42·4
III. Other Taxes, Licences, etc.	197,800	12·6
IV. Fees of Court, etc.	124,067	7·9
V. Rents and Miscellaneous Revenue	122,350	7·9
	<u>1,565,717</u>	<u>100·0</u>
Revenue of self-balancing Departments set off against Expenditure	575,962	
Total	<u>2,141,679</u>	

(B) *Analysis of Import Duties for 1933.*

It is not possible to give accurate figures of the amount of duty collected on goods imported from the United Kingdom, the rest of the Empire and foreign countries but the following table shows the amount of duty collected according to classes.

	£
Class I	132,179
Class II	1,662
Class III	262,305
Class IV	8,454
Total	<u>404,600</u>

Of the value of the goods imported during the year, 33·46 per cent. came from the United Kingdom, 18·6 per cent. from the rest of the Empire, and 47·94 per cent. from foreign countries.

3. *Analysis of Expenditure (on basis of Estimates for 1934).*

	£	Per cent.
I. Deficit on self-balancing Departments (See 2 (A)) ...	190,825	10·9
II. Debt Charges	109,513†	6·2
III. Administration	810,058	46·4
IV. Economic Development	186,919	10·8
V. Social Services	296,397	16·9
VI. Defence	85,763	4·9
VII. Pensions and Gratuities	67,080	3·9
	<u>1,746,555</u>	<u>100·0</u>
Expenditure of self-balancing Departments set off against Revenue	575,962	
Total	<u>2,322,517</u>	

4. *Reserve Funds, etc.*

At the 31st December, 1933, the Tanganyika Government had no reserve fund or other special funds but the excess of general assets over liabilities was £624,988. Of this £256,543 was held in cash and £222,000 on deposit with the Joint Colonial Fund.

* These are made up as follows: Interest, £336,578; Sinking Fund, £86,722; Management Expenses, £1,694.

† Exclusive of charges in respect of Railway Loans £321,538 debited to the Railway Accounts.

5. Grants-in-aid, etc.

No grant-in-aid has been given to Tanganyika Territory since 1922.

Grants from the Colonial Development Fund have been authorised as are set out in Appendix "B".

APPENDIX A.

PUBLIC DEBT ON 31ST DECEMBER, 1933.

<i>Legal Authority.</i>	<i>Amount raised.</i> £	<i>Rate of Interest.</i>	<i>Value of Sinking Fund.</i> £	<i>Remarks.</i>
—	3,121,031	Various	146,649	Imperial Exchequer Loan.
Ordinance 16 of 1928 ...	2,070,000	4½ per cent.	69,662	Trustee Security. Guaranteed by United Kingdom Treasury.
Ordinance 15 of 1931 ...	3,000,000	4 ..	—	do. do.
Ordinance 10 of 1932 ...	500,000	4 ..	—	do. do.
—	26,000	5 ..	—	Colonial Development Fund Loans.
	<u>£8,717,031</u>		<u>£216,311</u>	

APPENDIX B.

COLONIAL DEVELOPMENT FUND.

<i>No. and Item.</i>	<i>Amount Received.</i>	<i>Expenditure.</i>			<i>Total.</i>	<i>Charged to Revenue.</i>	<i>Claims Outstanding.</i>	<i>Grants Over-issued.</i>
		<i>1930-1932.</i>	<i>April to December 1932.</i>	<i>1933.</i>				
	£	£	£	£	£	£	£	£
INTEREST GRANTS.								
8. Manyoni-Kinyangiri Railway	30,000*	—	—	—	30,000	—	—	—
9. Tablet Working System ...	4,324	—	—	—	4,642†	—	318	—
11. Air Surveys ...	1,084	—	—	—	1,951†	—	147	—
12. Triangulation Surveys ...	2,271	—	—	—	2,438†	—	167	—
13. Engare-Nairobi Railway ...	10,914*	—	—	—	10,914	—	—	—
116. Realignment of Central Railway.	9,000*	—	—	—	9,000	—	—	—
LOANS.								
16. Water Boring ...	10,000*	11,213	—	—	11,213	1,213	—	—
65. Meat Rations, Ltd.† ...	16,000*	11,000	—	5,000	16,000	—	—	—
GRANTS.								
14. Tuberculosis Investigations ...	8,000	5,997	752	983	7,732	—	—	268
51. Colonial Veterinary Scholarships.	789	660	369	—	1,029	240	—	—
52. East African Railway Gauge Investigations.	715	450	530	450	1,430	715	—	—
17. Establishment of Stations at Moshi, Dodoma and Mbeya.	9,000§	9,594	964	1,173	11,731	—	2,731	—
53. Night Lighting at Mbeya ...	1,600*	1,427	201	—	1,628	28	—	—
53b. Improvements to Aerodromes and Landing Grounds.	10,000*	—	4,653	5,284	9,937	—	—	63
53b. Medium Wave Apparatus at Moshi and Dodoma.	1,070	—	—	—	—	—	—	1,070
117. Malarial Research Scheme ...	15,000	5,080	4,912	6,057	16,049	—	1,049	—
118. Tea Cultivation Investigation	2,000*	9	619	100	728	—	—	1,272
169. Geodetic Triangulation Survey	7,000*	—	7,000	—	7,000	—	—	—
171. Wool Production Research ...	2,000*	40	1,940	—	1,980	—	—	20
210. Tsetse Research ...	20,800	5,000	7,500	11,248	23,748	—	2,948	—
211. Central Quarantine Station, Amani.	1,260	—	342	2,467	2,809	—	1,549	—
212. Research into Virus Diseases of Plants.	1,100	7	738	133	878	—	—	222
221. Contribution to Royal (Dick) Veterinary College Scholarship.	1,300	500	—	800	1,300	—	—	—
Coffee Research Station ...	—	—	—	623	623	—	623	—
Total ...	165,947				174,760	2,196	9,532	2,915

* Loans and Grants fully received. Other schemes still in progress.

† Actual interest charges incurred to 31st December, 1933.

‡ Debentures to the value of £16,000, are held by Government as security for advances made to the Company.

§ Previously called "Wireless Stations". £1,070 has been credited to 53 (b) "Medium Wave Apparatus at Moshi and Dodoma" and £1,000 to 53 (b) "Improvements to Aerodromes and Landing Grounds".

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
			£	£	£	£
1921	...	...	204,795	971,180	343,287	1,519,262
1930	...	...	358,748	1,052,186	1,579,189	2,990,123
1931	...	...	244,823	769,567	939,990	1,954,380
1932	...	...	641,217	916,141	844,540	2,401,898
1933	...	...	681,316	1,038,638	1,052,902	2,772,856

(ii) *Domestic Exports by Classes, 1933.*

			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Class V.</i>	<i>Total Merchandise</i>
			£	£	£	£	£	£
United Kingdom	...	...	72,100	411,104	368	4	195,369*	678,945
Kenya and Uganda†	...	...	481,649	140,089	3,615	229	—	625,582†
India	...	...	3	155,889	37	2,000	—	157,929
Zanzibar	...	...	19,125	48,772	326	74	—	68,297
Union of South Africa	...	...	242	24,166	5	—	—	24,413
Rest of Empire	...	...	1,614	23,712	119	—	—	25,445
<i>Total Empire</i>	...	...	574,733	803,732	4,470	2,307	195,369*	1,580,611
Belgium	...	...	136	335,598	82	—	—	335,816
Germany	...	...	15,722	261,732	62	—	—	277,516
Holland	...	...	90	80,090	9	—	—	80,189
France	...	...	368	72,646	3	—	—	73,017
Italy	...	...	—	52,602	20	—	—	52,622
United States of America	...	...	—	48,553	12	—	—	48,565
Other foreign countries	...	...	18,980	75,437	407	2	—	94,826
<i>Total foreign countries</i>	...	...	35,296	926,658	595	2	—	962,551
GRAND TOTAL	...	...	610,029	1,730,390	5,065	2,309	195,369*	2,543,162

(iii) *Principal Domestic Exports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of destination with amounts in £'000.</i>
			£	
	Coffee—			
	Hulled	8,547 tons	256,597	Kenya and Uganda (250), Germany (3), United Kingdom (3).
	In Parchment	4,004 „	170,269	Kenya and Uganda (91), United Kingdom (68), Germany (11).
	In Cherry	167 „	2,640	Kenya and Uganda (all).
	Ground or roasted	—	17	
		12,718	429,523	
	Rice	125,858 cwt.	62,382	Kenya and Uganda (61), Belgian Possessions (1).
	Tobacco—			
	Manufactured	222,163 lb.	32,323	Kenya and Uganda (32).
	Unmanufactured	127,156 „	1,042	
	Cigarettes	20,988	3,522	Kenya and Uganda (3).
		370,307	36,887	
	Ghee	9,604 cwt.	19,586	Kenya and Uganda (16), Zanzibar (3).
<i>Class II.</i>				
	Hemp and Hemp Tow (Sisal)	69,600 tons	881,772	Belgium (281), United Kingdom (207), Germany (203), Holland (59), United States of America (36), France (17), Italy (11).
	Cotton, raw	113,677 centals	276,864	India (144), United Kingdom (87), Kenya and Uganda (41).
	Groundnuts	19,177 tons	166,223	United Kingdom (60), Germany (28), France (18), Union of South Africa (16), Italy (15), Holland (12), Kenya and Uganda (9), Portuguese Possessions (5).

* Value of raw gold bullion exported to United Kingdom.

† Exports to Kenya and Uganda consist mainly of merchandize for shipment at Mombasa. The ultimate destination of these exports is not recorded in Tanganyika Territory.

(iii) *Principal Domestic Exports, 1933—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of origin, with amounts in £'000.</i>
<i>Class II.—continued.</i>			
Hides and Skins—			
Hides, dry and dry-salted...	3,880 tons	153,898	Belgium (49), Kenya and Uganda (36), France (23), United Kingdom (18), Italy (17), Germany (7).
Sheep and goat skins ...	280 „	11,484	France (5), Kenya and Uganda (4), United Kingdom (2).
Other Skins	4 „	1,419	Kenya and Uganda (1).
	4,144 „	166,801	
Copra	8,157 tons	62,160	Zanzibar (34), Kenya and Uganda (14), Italy (8), France (4).
Beeswax	680 „	52,751	United Kingdom (22), Germany (15), United States of America (7), Belgium (3), Holland (2) France (1).
Seeds—			
Castor	15 „	147	United Kingdom (all).
Cotton	1,980 „	4,405	United Kingdom (4)
Sesame	4,441 „	41,845	Italian Possessions (17), Zanzibar (5), France (4), Kenya and Uganda (2), Holland (2).
Other	84 „	281	
	6,500 „	46,678	
Gums—			
Arabic	911 „	10,064	India (8), Kenya and Uganda (1).
Copal	104 „	5,175	United Kingdom (3), Zanzibar (2).
	1,015 „	15,239	
<i>Class V.</i>			
Gold, raw	38,704 oz. troy	195,369	United Kingdom (all).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	<i>United Kingdom.</i> £	<i>Rest of Empire.</i> £	<i>Foreign Countries.</i> £	<i>Total.</i> £
1921	332,065	1,058,004	41,299	1,431,368
1930	1,766,448	710,391	1,586,196	4,063,035
1931	957,720	559,128	1,029,767	2,546,615
1932	697,870	409,194	896,078	2,003,142
1933	693,611	385,609	994,057	2,073,277

(ii) *Imports by Classes, 1933*

	<i>Class I.</i> £	<i>Class II.</i> £	<i>Class III.</i> £	<i>Class IV.</i> £	<i>Total.</i> £
United Kingdom	102,689	3,954	431,319	29,059	567,021
Kenya and Uganda	162,310	2,832	24,969	6,169	196,280
India	26,015	1,167	102,033	4,696	133,911
Union of South Africa	3,180	9,846	561	1,525	15,112
Rest of Empire	8,289	135	28,550	3,332	40,306
<i>Total Empire</i>	<i>302,483</i>	<i>17,934</i>	<i>587,432</i>	<i>44,781</i>	<i>952,630</i>
Japan	393	—	416,453	—	416,846
Germany	8,631	527	186,040	2,577	197,775
United States of America... ..	2,142	65	63,660	1	65,868
Holland	19,626	159	41,149	—	60,934
France	6,144	17	13,684	5,062	24,907
Belgium	370	1	23,599	148	24,118
Other foreign countries	20,889	6,855	175,014	851	203,609
<i>Total foreign countries</i>	<i>58,195</i>	<i>7,624</i>	<i>919,599</i>	<i>8,639</i>	<i>994,057</i>
GRAND TOTAL	360,678	25,558	1,507,031	53,420	1,946,687

In addition bullion and specie to the value of £126,590 was imported from the United Kingdom.

(iii) *Principal Imports, 1933.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of origin with amounts in £'000.</i>
Tobacco—			
Cigarettes	291,314 lb.	56,926	United Kingdom (42), Kenya and Uganda (14).
Manufactured	100,866 „	13,773	Holland (11).
Unmanufactured	307,151 „	9,168	Kenya and Uganda (9).
Other Kinds	1,093 „	393	
	<u>700,424 „</u>	<u>80,260</u>	
Grain, Pulse and Flour—			
Wheatmeal and flour	52,031 cwt.	30,096	Kenya and Uganda (24), India (4).
Maize	56,441 „	10,670	Kenya and Uganda (all).
Other grain	19,996 „	7,155	Kenya and Uganda (3), India (3).
Meal and flour, other	19,480 „	5,409	Kenya and Uganda (4), Union of South Africa (1).
Pulse, other	11,343 „	4,577	Kenya and Uganda (2), India (1).
Rice	6,334 „	4,395	India (4).
	<u>165,625 „</u>	<u>62,302</u>	
Sugar, refined	2,936 tons	57,981	Kenya and Uganda (56).
Spirits—			
Whisky	16,327 gal.	21,893	United Kingdom (all).
Brandy	2,063 „	2,816	France (2).
Gin and Geneva	3,068 „	2,158	United Kingdom (2).
Other Kinds	381 „	617	
	<u>21,839 „</u>	<u>27,484</u>	
Ale, Beer, etc.	81,059 „	18,384	United Kingdom (7), Germany (5), Kenya and Uganda (4), Holland (2).
Class III.			
Cotton manufactures—			
Piece-goods—			
(a) Grey (unbleached)	10,141,523 yd.	103,418	Japan (86), India (16).
(b) Bleached	3,038,652 „	35,593	Japan (23), United Kingdom (6), Holland (3), India (2).
(c) Printed Khangas	2,375,876 „	50,942	United Kingdom (36), Holland (14).
(d) Printed (other than Khangas).	3,865,645 „	42,742	Japan (39), United Kingdom (2).
(e) Dyed in the piece	11,872,167 „	152,504	Japan (112), United Kingdom (27), India (10).
(f) Coloured	4,726,861 „	57,996	Japan (32), India (10), Holland (9), United Kingdom (2), Belgium (2).
Total piece-goods	36,020,724 „	443,195	
Blankets	281,859	19,230	Holland (7), India (2), Japan (2), Belgium (2).
Thread... ..	110,011 lb.	11,618	United Kingdom (9).
Other Kinds	—	14,180	Japan (6), United Kingdom (5).
Total cotton manufactures	—	488,223	
Oils—			
Motor Spirit	1,277,060 gal.	82,143	Dutch East Indies (63), United States of America (12), Persia (2), Germany (2).
Illuminating	988,814 „	44,980	Dutch East Indies (17), United States of America (8), Germany (2).
Lubricating... ..	190,965 „	19,833	United States of America (10), United Kingdom (5), Germany (3).
Fuel	958,415 „	15,806	Dutch East Indies (9), United States of America (4), Persia (2).
	<u>3,415,254</u>	<u>162,762</u>	
Machinery and parts (all kinds)	—	137,227	United Kingdom (75), Germany (44).
Iron and Steel Manufactures—			
Galvanised Sheets	1,301 tons	17,875	United Kingdom (10), Belgium (7).
Other Kinds	4,474 „	71,894	United Kingdom (31), Germany (23) Belgium (9).
	<u>5,775 „</u>	<u>89,769</u>	
Motor Cars, Lorries, etc., and parts—			
Motor Cars and lorries	393	44,394	Canada (19), United Kingdom (16), United States of America (7).
Motor Car parts, including tyres and tubes.	—	43,399	United Kingdom (15), United States of America (10), France (8).
		<u>87,793</u>	

(iii) *Principal Imports, 1933—continued.**Class III.—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of origin, with amounts in £'000.</i>
Apparel	—	72,129	Japan (41), United Kingdom (11).
Silk and Artificial Silk Manufactures—			
Silk Piece-goods	358,584 lin. yd.	15,446	Japan (12).
Other Silk Manufactures	—	2,090	Japan (1).
Artificial Silk Piece-goods	1,460,193 „	26,126	Japan (26).
Other Artificial Silk Manufactures.	—	784	
		44,446	
Bags and Sacks	135,637 doz.	32,224	India (32).
Cement	10,718 tons	28,600	United Kingdom (18), Japan (8).
Medicines and Drugs... ..	—	24,404	United Kingdom (17), Germany (5).
Paper Manufactures—			
Stationery	—	11,775	United Kingdom (7), Germany (3).
Packing	—	5,157	United Kingdom (4).
Printing	1,767 cwt.	2,395	United Kingdom (1).
Other	—	4,611	United Kingdom (1).
		23,938	
Agricultural and Horticultural Tools—			
Hoes (Jembes)	—	20,024	Germany (18), United Kingdom (2).
Other Kinds	—	3,525	Germany (2), United Kingdom (1).
		23,549	
Electrical Goods and Apparatus		22,122	United Kingdom (18), Germany (2).
Railway rolling stock and parts.		21,368	Germany (18), United Kingdom (3).

V.—Natural Resources.**A.****1. AGRICULTURE.***General.*

Agriculture, including stock rearing, is much the most important source of wealth of the country and is the principal occupation of European settlers and natives.

About 2,500,000 acres has been alienated for European settlement. The chief crops grown by Europeans are sisal, coffee, tea, tobacco, coconuts, cotton, wheat, barley, and maize. Vegetables and fruits are minor crops, and progress is being made in the growing and distillation of essential oils.

The chief crops grown by natives may be divided into two categories: cash crops and food crops. In the former are cotton, coffee, groundnuts, tobacco, sesame and beeswax, while in the latter are rice, millets and sorghums, maize, cassava, sweet potatoes and pulses.

In 1933, figures of export for sisal, coffee, beeswax, groundnuts, cotton, rice and hides and skins were records for these crops.

The principal natural difficulties affecting agriculture in Tanganyika, in addition to pests and diseases of individual crops, are

(i) drought, to counteract which little can be done until irrigation can be further developed;

(ii) locusts, of which, although not indigenous to the Territory, there are frequent visitations from the Sudan and Abyssinia or from West Africa. Active steps are taken by the administration to apply such measures of prevention and destruction as are possible and the whole question of locust infestation throughout the world is under close study by the Locust Control Committee, working through the Imperial Institute of Entomology.

The development of crops for export is hindered in many areas by the fact that the main railway communications run from east to west and were built for strategic and political purposes and are not well sited with regard to the productive areas. In the southern highlands of the Iringā Province, as the only means of communication are roads, the practicability of European settlement depends on the possibility of growing crops of which the value per unit of weight is high, e.g., tea, coffee, and tobacco. In the northern highland area (Moshi and Arusha) the agriculturists are better placed with regard to communications; here the principal crops grown by Europeans are coffee, and, along the railway line towards the sea, sisal.

Most of the produce of Tanganyika is exported via the Suez Canal and the transport charges are therefore relatively high owing to the dues which shipping has to pay to the Canal authorities.

The efforts of the Administration, and in particular the Agricultural Department, are being concentrated on increasing the output of the Territory and improving the quality of the crops produced. So far as education of the native producer is concerned the main activities at present are:—

(1) The establishment of model native peasant holdings, which are, for the present, under the guidance of the Department of Agriculture. These peasant holdings will be up to twenty acres in extent and by development will be capable of supporting the family and its livestock in much better condition than obtains at present.

(2) The taking over by the Department of Agriculture of the Nyakato School at Bukoba as a coffee training centre. Other Departments of the Government help with the work of this school, which is becoming a valuable instrument in the development of Bukoba.

The Government has also embarked on two schemes of agricultural research, a Coffee Experimental Station and a Sisal Experiment and Research Station, to which further reference is made below.

Attention has also been devoted to the development of agricultural co-operation. Legislation relating to the constitution and regulation of Co-operative Societies was enacted in 1932, and in that year the Kilimanjaro Native Co-operative Union, Limited, a successor to the Kilimanjaro Native Planters' Association which came into being during 1922, was formed. The Co-operative Societies Ordinance and Rules of 1932 are based on the work of Mr. C. F. Strickland, late I.C.S., who visited the Territory in the earlier part of 1931 for the purpose of studying the question in its application to local conditions. The main factor in establishing co-operative organization under such legislation is the establishment of primary societies, and therefore the first thing to be done in re-organizing the Kilimanjaro Native Planters' Association under the Ordinance was to decentralise control and establish primary societies. Fortunately, the structure of the Association made this a comparatively simple matter, and 19 societies have now been formed each with its own Chairman, Committee and Secretary. Each society is a member of the Kilimanjaro Native Co-operative Union, Limited, on which it is represented by its Chairman, and from amongst the representatives are elected annually the President and Committee of the Union.

The working of this Co-operative Union has been highly successful, resulting in a much higher quality of produce and a corresponding rise in values.

In the Lindi Province where an important native tobacco industry has been established, the tobacco is grown, graded, cured, baled and marketed under the direct supervision of the Agricultural Department. This scheme is working satisfactorily but as the industry continues to expand, natives themselves will have to take charge and finance the industry, thus leading eventually to co-operative union. At present, this industry does not warrant the expense of a European in charge as in the case of the Kilimanjaro Native Co-operative Union, Limited.

The Department of Agriculture supervises the grading of various kinds of native produce, mainly tobacco and coffee. Particularly in the case of coffee grading has led to a higher quality product and meets with the full approval of merchants.

Information as to the principal individual crops is appended. The principal export crops are mentioned first and then the crops produced mainly for local consumption. No agricultural census has been taken in Tanganyika so that in many cases exact information is not obtainable.

East African Agricultural Research Station, Amani.

The East African Agricultural Research Station is located at Amani, which is some 50 miles from Tanga, and is reached from Muhesa Station, on the Tanga-Arusha railway by a road which runs for some distance along the track of the former narrow-gauge railway from Tengen to Sigi. The station itself is some 3,000 feet above sea level; the land attached to it, lying on the slopes of the Eastern Usambara Mountains, provides a wide range for testing the adaptability of plants to various altitudes.

The original Amani Institute was founded by the Government of German East Africa in 1902 as an Institute for scientific research, with a botanical, chemical, and zoological laboratory. The work of the Institute included the introduction and cultivation of foreign tropical plants or trees of economic value, scientific investigations in the interests of East African plantations, the study of plant pests and diseases and of methods of fertilization, the analysis of soils, etc. The buildings erected by the Germans are said to have cost £20,000, and their total expenditure on the Institute to have been £100,000.

At the close of the war the German staff were repatriated. For a number of years, until 1927, the Institute was maintained by the Tanganyika Department of Agriculture on a minimum basis, being for the last four years of this period in the sole custody of a Head Gardener.

The East African Commission which visited Tanganyika in 1924 commented upon the neglect of the British Government to make use of the opportunities presented by Amani as a station for research in tropical agriculture, and the observations of this Commission drew attention to the potential importance of Amani, as a link in an Imperial chain of Central Research Stations, the establishment of which was approved by the Imperial Conference of 1926; and a scheme was eventually drawn up which involved capital expenditure up to a total of £22,500 on the re-establishment of the station, and permanent recurrent expenditure of £23,500 a year on its upkeep.

It was considered, however, that it would not be possible for a number of years, to embark upon the full programme of research envisaged, and modified arrangements were proposed for the initiation of a research station at a total cost of £17,500 a year in the first instance.

The capital expenditure recommended was provided in an agreed proportion by the East African Governments concerned, with the assistance of a grant of £2,000 from the Colonial Research Fund. A scheme for the provision of recurrent expenditure was adopted under which the East African Governments contributed in the following proportions.

	£		£
(a) Tanganyika ...	6,000	(d) Zanzibar ...	1,200
(b) Kenya ...	1,700	(e) Nyasaland ...	300
(c) Uganda ...	1,800	(f) Northern Rhodesia...	300

In addition, the Empire Marketing Board agreed to contribute during the three years from 1927-28 a sum not exceeding £6,000 a year. From 1930-31 onwards the Board contributed a block grant at the rate of £6,000 a year towards the maintenance of the Institute. Since the abolition of the Board in 1933 the grant has been continued on the same scale by His Majesty's Treasury. Recently the Carnegie Trustees have supplemented a previous gift of £2,000 by an endowment of £10,000 for the Library.

The broad function of the East African Agricultural Research Station at Amani is to undertake research into the agricultural problems of Tropical Africa for the benefit of the British Dependencies in Tropical Africa and other parts of the Empire. The present programme of research is based upon recommendations of the Colonial Advisory Council of Agriculture and Animal Health, and a Conference of Directors of Agriculture of the Eastern and Central African territories held at Amani in February, 1931.

The work at Amani is directed to "long range scientific investigation" and includes studies of problems facing the coffee and sisal industries in East Africa, pathological problems connected with economic crop plants and soil investigations. Work of practical value has already been accomplished for the coffee, sisal, and tea industries, and in connexion with phytopathological matters. Research work in hand promises to produce further results of value to agriculturists in Eastern Africa and the scientific staff at the Station co-operate with the officers of Departments of Agriculture and visit from time to time the several East African territories in connexion with their research investigations, and are freely consulted by the local Departments of Agriculture and by agriculturists alike.

Export Crops.

Sisal.—The production of sisal is undertaken only by non-natives, mostly Europeans, on plantations, and generally by companies with fairly large capital on an extensive scale, as sisal production requires machinery, such as decorticators, etc., and light railways or tram-lines for transporting the sisal leaves to the factory. Small scale production is not economic except perhaps when the leaves can be sold to a neighbouring large scale establishment.

238,665 acres were estimated to be under sisal in 1933. By far the greater portion of the crop is grown in the coastal zone, the main area being around Tanga; Dar-es-Salaam and Lindi come next, with a smaller quantity from Mikindani and a little from Moshi and Mwanza.

Up to about 1929 the price of No. 1 sisal per ton in the London market was about £35. At one time in 1932 it was quoted as low as £12 10s. per ton. Since then the price has slightly improved and at present (March, 1935) it stands at about £15.

Sisal growers are passing through a very difficult time. Some estates have ceased production, but costs have been drastically reduced, by a considerable reduction in the number of employees (both European and native) and by heavy cuts in salaries and wages, and the volume of exports has actually been increased. (Exports in 1929 were 45,728 tons, value £1,485,593; and in 1933, 69,600 tons, value £881,772). While the bulk of the estates are thus carrying on, they are not able to make any provision for depreciation, interest on capital, or improvements. Some of them have been operated at high pressure owing to the insistence of banks, financial houses, or merchants to whom they are financially indebted. The replanting of old areas has been abandoned in some cases (owing to lack of finance) but the older and larger companies have to some extent at least carried out their replanting programmes. The outlook for the future of sisal is by no means dark and a number of steps have been taken to increase the usage of sisal in manufactures other than ropes and twine. Little research work in connexion with sisal cultivation has yet been done, but the long range research work has been started at Amani which should be of considerable value to the industry in due course. Plans for the extension of this work at Amani are under preparation.

A grant has been received from the Colonial Development Fund, supplemented by a cess agreed to by the Sisal Planters' Association on each ton of sisal exported, for the establishment of a Sisal Experiment and Research Station. Land has been secured in the Tanga Province, the main sisal-producing area of the Territory, and work in connexion with the lay-out of the Station is in progress.

Exports during the last five years have been as follows:—

Year.	Quantity. Tons.	Value. £
1929	45,728	1,485,593
1930	49,962	1,172,315
1931	55,939	707,177
1932	60,554	698,202
1933	69,600	881,772

Coffee is grown extensively both by Europeans and by natives. The former chiefly grow the *Arabica* variety; the natives grow mainly *Robusta*, but also considerable quantities of *Arabica*, especially in the Kilimanjaro area. Coffee, unlike sisal, is well suited for cultivation in suitable areas by small holders, as well as by larger concerns, although in the past there has been a tendency to attempt to cultivate too great an area for proper supervision.

The bulk of the Tanganyika coffee is exported through Mombasa (Kenya) and a good deal of the crop is also cured in Kenya. The erection of coffee-curing works and factories in Tanganyika is subject to licence under the Coffee Factories Ordinance.

The main producing areas are the Bukoba District, the Northern Province and the south-western Highlands of Rungwe, Mbosi and Mbeya. The growing of coffee is expanding both by native and non-native enterprise, and the crop is at present second in importance in export value.

The area of greatest production is the Bukoba District where the crop is practically all grown by natives. Both *Arabica* and *Robusta* are grown. The coffee is dried in the cherry and the coffee bean removed by hullers which are generally of a home-made type. A very good crop was produced in 1933, some 2,868 tons being exported as compared with 1,140 tons in 1932. This increase in production was due to the supervision and propaganda work carried out by the Administration and the Department of Agriculture with a view to the regeneration of the native-owned *Arabica* trees, which, due to neglect, were gradually deteriorating. A system of grading and inspection was introduced at Bukoba in 1932 and is progressing well with co-operation between exporters and the grader. There are four main grades, namely: Native, Undergrade Native, Plantation and Undergrade Plantation. Plantation coffee again may be graded as Parchment

or Hulled. For grading purposes, Native Coffee is coffee derived from trees of the Robusta variety and Plantation Coffee from trees of the Arabica variety. Little direct business is done in Bukoba with overseas markets, the crop mainly going to Mombasa for re-export.

The production of coffee in the Northern Province (which includes the Usambara Mountains, Moshi and Arusha) is practically all of the Arabica type with small amounts of Robusta in the areas of high rainfall in the Eastern Usambaras where conditions have proved unsuitable for the successful growing of Arabica. This Robusta crop is all sold for local consumption.

The Moshi crop was 890 tons of parchment in 1933, and was marketed by the Kilimanjaro Native Co-operative Union, Limited, on behalf of members of the twenty-three societies which constitute the Union, the majority of the crop being shipped to London for sale. In addition to the marketing of their members' coffee, the officials of the Kilimanjaro Native Co-operative Union and of the smaller societies are keenly alive to the necessity of and giving more assistance with cultural matters, particularly in the case of plots of abandoned coffee plants and to pest and disease control. Most of these societies now have permanent offices and stores equipped for sprays and spraying material.

Native Authority Coffee Rules are in force in the Moshi, Usambara and Arusha Districts and elsewhere. Under these rules all new plantings are strictly controlled and no haphazard or careless plantings are allowed. Where considered necessary, plots must be terraced or contour-hedged before planting.

In the Northern Province and also in the Southern Highlands much greater attention is now being given to cultivation and to such matters as the prevention of soil erosion, contour-terracing, cover-cropping and to a saner pruning programme with the object of maintaining a good leaf area on the plants.

The main coffee producing areas of the Southern Highlands are Rungwe, Mbosi and Mbeya. In Rungwe and Mbeya the coffee grown is all Arabica and is mainly of non-native production.

The manifold problems connected with coffee growing have led to the establishment of a Coffee Research Station. This station is situated on the slopes of Kilimanjaro at Lyamungu some twelve miles from Moshi. The station is 300 acres in extent and it will investigate the more pressing problems of coffee growing in East Africa generally. Staff have been appointed and lay-out has begun with clearing, contour-terracing and cover-cropping of small areas destined to become experimental plots. Trials with various shade trees are already in progress. The influence of this station is being extended to Bukoba, and it is hoped to have a similar station in the Southern Highlands.

The exports of coffee during the last five years have been as follows:—

Year.	Quantity. cwt.	Value in £
1929	177,140	588,871
1930	230,940	397,040
1931	185,020	247,037
1932	227,240	463,597
1933	254,360	429,523

Groundnuts occupy approximately 100,000 acres; they are grown mainly for local consumption and the surplus available for export, though considerable, fluctuates violently.

Groundnuts are an important native-grown crop. In 1931 the exports fell very much owing to the almost complete failure in the Mwanza-Tabora area, one of the chief centres of production. This was ascribed to the absence of good planting rains. Planting also decreased as a result of poor prices offering and in the Lindi area rosette disease was prevalent. The efforts made to stimulate production for export in 1932 and 1933 met with great success, as shown by the figures set out below:—

Exports.

1929.		1930.		1931.		1932.		1933.	
Tons.	Value.	Tons.	Value.	Tons.	Value.	Tons.	Value.	Tons.	Value.
7,765	£120,448	17,333	£186,567	3,070	£28,706	15,873	£182,010	19,177	£166,223

Cotton.—Cotton as a planters' crop is not making great headway but, as a native crop it still holds an important place. The crop gives a low yield per acre and attempts to secure a higher yield by cultural operations have not been altogether satisfactory. The selection of suitable strains for local conditions is of importance and attention is being devoted to this problem. The Empire Cotton Growing Corporation has recently undertaken to assist the Department of Agriculture in its endeavours to improve cotton. The growing of cotton is controlled by various Ordinances. Action has been taken to prevent the mixing of seed by movement of seed cotton from district to district, to curtail the excessive transport of seed cotton within and without the district in which it is grown; to give the established ginner a greater responsibility for the promotion of the crop in his zone, or where zoning is not applied, in his district; and by means of a fair price scale and supervision and check weighing, to protect the native grower against unfairly low returns. No new ginneries may be erected until the size of the crop warrants such action, but old ginneries may be re-sited. There are 41 ginneries in the country of which 24 were licensed in 1933.

The export of cotton lint during the last five years have been as follows:—

Year.	Quantity. cwt.	Value of £
1929	98,948	487,863
1930	73,414	247,413
1931	48,526	119,752
1932	64,180	183,747
1933	101,500	276,864

Coconuts are grown mainly by natives along the coastal belt of the Meru, Tanga, and Pangani areas; there are also Indian and Arab plantations. The greater proportion of coconuts and copra produced is used locally for food and in the manufacture of soap, but some 7,000 tons per annum of copra have been exported in recent years. Prices have fallen greatly since 1929 and the maintenance of some of the plantations has been neglected. The Plant Pest and Disease (Coconut) Regulations have been more strictly enforced and there are now signs of improvement. The methods of production of copra are crude, but efforts are being made to effect improvements, including the introduction of kiln drying. Tanganyika copra falls in the commercial grade of "Fair Middling".

The following figures show the copra exports for the past five years:—

Year.	Quantity cwt.	Value. £
1929	158,400	145,015
1930	147,900	109,733
1931	144,680	62,209
1932	145,300	64,694
1933	163,140	62,160

Rice.—The production of rice is slowly but steadily increasing under the stimulus of a campaign undertaken by the Department of Agriculture. Much the greater part of the production is consumed locally but a considerable export is developing. Exports increased from 52,000 cwt. in 1929 to 126,000 cwt. in 1933, while imports fell from 98,000 cwt. to 6,000 cwt., indicating that the internal market is now substantially captured. Selections and trials of local varieties are being carried out in Musoma and attention is being paid to the propagation of the Burgala variety.

Exports of rice during recent years have been as follows:—

Year.	Quantity. cwt.	Value. £
1929	51,884	58,985
1930	90,131	73,682
1931	95,095	51,209
1932	107,700	62,939
1933	125,860	62,382

Sesame seed (simsim).—This crop is produced mainly in the Lindi area where it is still a popular crop with the natives. The efforts made to increase the crop were successful and the quantity produced exceeded that of 1929. Attention has also been given to purity of product. Mwanza and Kilwa are two other fairly important areas where it is grown.

The export figures are as follows:—

1929.		1930.		1931.		1932.		1933.	
Tons.	Value.	Tons.	Value.	Tons.	Value.	Tons.	Value.	Tons.	Value.
4,256	£74,773	3,115	£32,547	3,825	£36,715	4,811	£50,130	4,441	£41,845

Tobacco.—The Department of Agriculture continues its efforts to foster the production of fire-cured tobacco by native growers; in Songea, Masasi and Biharamulo Districts this industry is progressing slowly but satisfactorily. In the Iringa Province both Turkish and Virginia tobacco is grown by Europeans on the plantation system. The production of fire-cured tobacco during the past four years has been as follows:—

Year.	Quantity. lb.
1930	20,548
1931	19,360
1932	101,530
1933	87,736

A tobacco experimental station has been established in the centre of the tobacco-growing area of Iringa by the Department of Agriculture, where experiments are being carried out. Until the industry is established, the Department will supervise the curing and grading of the native crop before export.

The acreage under tobacco in 1933 was about 3,900 acres.

Tea shows signs of becoming a crop of increasing importance in the Territory. It is grown by Europeans on the plantation system, though the plantations vary a good deal in size. One of the difficulties encountered by the planter is the provision of capital for the erection of the necessary factory or factories. The crop is being developed in the Usambaras, Mufindi, and Rungwe areas: only 3 or 4 estates are actually producing at present and practically only trial shipments have been exported, the remainder of the tea produced being sold locally. Two estates in the Usambaras produced 45,000 lb. of tea during 1932 and 30,000 lb. during 1933. Favourable market reports have been received on the small quantities so far exported. In the Mufindi area of the Iringa Province a tea factory has been erected to take the tea from the smaller estates in the district.

The acreage under tea in 1933 was about 1,800 acres.

The prospects of developing tea cultivation in the Territory has recently been the subject of examination by Dr. H. H. Mann and his report* indicates that suitable soils and climatic conditions prevail in the East Usambaras, Mufindi, and Rungwe for tea cultivation.

Towards the end of 1933, proposals concerning the regulation of tea export were under consideration by all tea-producing countries. The Territory having agreed to the principle of restriction, has now agreed to limit further planting to 2,900 acres during the next four years. This should give the country a tea industry at least capable of supplying its internal requirements.

* Report on Tea Cultivation in the Tanganyika Territory and its Development, by H. H. Mann, Ph.D. (Crown Agents for the Colonies, 5s. net).

Beeswax has been an export of minor importance for a number of years. In 1933 increased interest in this commodity owing to its continued high price in comparison with other cash crops, together with very favourable climatic conditions, resulted in a record output of 680 tons. Trained African Instructors have toured a number of areas where the output in previous years has been small, to show the inhabitants how to prepare their wax for sale, and to encourage the erection of beehives in the most suitable places. Stress is being laid on the necessity for the producer offering for sale wax as clean as possible. The granting of exclusive buying licences is contemplated in new areas in order to control the quality of the wax being sent out, and so prevent any poor consignments in the early stages from giving a bad name to the areas which would be difficult to alter subsequently. Conversations are proceeding with exporters with a view to obtaining uniformity of grading and packing.

Exports of beeswax for the past five years have been as follows:—

Year	Quantity cwt.	Value £
1929	6,721	48,149
1930	3,773	20,297
1931	12,143	47,010
1932	7,820	31,965
1933	13,600	52,751

Minor Export Crops.—There are a number of other crops in which a small export trade exists or might be developed. Crops grown at present primarily for local food supply but of which there are some exports are dealt with below. Others include:—

(i) Spices, especially pepper; cardamoms; nutmegs; small chillies, now being successfully grown by one European planter; large chillies, which are more suitable for native production; ginger, of which a good quality is being produced by natives of the Ulugurus.

(ii) Areca or betel-nut, grown by natives and Europeans in the coastal areas.

(iii) Cinchona (quinine) bark, suitable for extension by Europeans in the Eastern Usambaras.

(iv) Scents and essential oils, which are mainly suited for European cultivation, e.g., "Petit-grain" oil distilled from the leaves of the seville-orange tree, which has been highly rated by comparison with the Paraguay product and might be a useful side-line for sisal estates; ecquellor-oil (made from the orange itself); peppermint oil, patchouli, pelargonium, etc.

(v) Cashew nuts, which can be grown extensively in the coastal area and of which trial consignments are being made to India. The question of the marketing of cashew nuts and proposals to encourage and assist the increased planting of cashew trees are under consideration.

(vi) Castor seed. Attempts to develop the export of this seed in the past have failed through lack of adequate marketing arrangements. With a view to ensuring a fair market and thus encouraging cultivation the issue of exclusive licences to prepare castor seed is under consideration.

Food Crops.

Millets are the most important of the native food crops and occupy a greater area than any other crop. Exact figures are not available but the total area under millet appears to be between 1,500,000 and 2,000,000 acres, and the total crop of the order of 500,000 tons. Exports are negligible in proportion to the total crop, having been 5,270 tons (value £20,710) in 1931, 3,528 tons (value £14,911) in 1932, and 263 tons (value £1,005) in 1933. Many introduced varieties have been tested and failed, and the work initiated in the isolation of strains is being developed. Such work would have more than local value.

Maize is the next important food crop, occupying some 800,000 acres in 1933. Until 1932 the local production did not quite meet the local demand and there was a net import of maize and maize-meal, although it was small compared with the total consumption. In 1932 exports (58,000 cwt.) exceeded imports (8,500 cwt.) but in 1933 owing to the drought imports (75,000 cwt.) again exceeded exports (18,000 cwt.). While the Department of Agriculture is seeking to encourage the cultivation of maize, as of other native crops, no special research work is being done on it.

Beans and pulses are another important food crop, occupying some 570,000 acres in 1933. There are some small and spasmodic exports and some varieties, e.g., Madagascar beans, are suitable for development as an export crop by both natives and Europeans. Attention to grading would, however, be required.

Root crops for local consumption include cassava (about 200,000 acres), sweet potatoes (120,000 acres), ordinary potatoes, and yams. There is at present no important trade in these.

Bananas are grown over a wide area (some 250,000 acres) but there is at present no export.

Sugar.—The area under sugar is returned as about 20,000 acres, and there are 4 small sugar factories for the production of jaggery. The production is practically wholly for local use.

The bulk of the sugar consumed in Tanganyika at present comes from Kenya and Uganda, owing to the customs duty of 12s. per 100 lb. on overseas imports. A consumption tax of 3s. per 100 lb. has now been imposed on all sugar, however, and the customs duty reduced from 12s. to 9s. The importation of new sugar machinery is only permitted under Government licence.

There is, of course, a very large production of miscellaneous fruit and vegetables for local consumption, and a small production of wheat the acreage of which in 1933 was about 8,000 acres, mainly in the Iringa province. The production of these foodstuffs could no doubt be developed.

2. FORESTRY.

The total area of forest lands at the end of 1933 was as follows:—

	<i>Acres.</i>	<i>Square Miles.</i>
Reserved forests	2,517,741	or 3,934
Forests awaiting reservation	67,053	or 105
Privately-owned forest	40,000	or 63
	<u>2,624,794</u>	<u>or 4,102</u>

	<i>Acreage under Commercial Timber.</i>	<i>Other Forest Land.</i>	<i>Total.</i>
Reserved forest	1,048,537	1,469,204	2,517,741
Forests awaiting reservation	11,163	55,890	67,053
Privately-owned forest	31,500	8,500	40,000
	<u>1,091,200</u>	<u>1,533,594</u>	<u>2,624,794</u>

Six sawmills are at work in the Territory; one of these is on private land using timber growing on private estates and two are very small concerns. The largest timber concern in the Territory is still temporarily inactive. Apart from sawmills there are two concessions in mangrove woods on the coast, which are in operation producing building poles, fuel, and tanning bark. It was reported at the end of 1932 that, as a result of the continued trade depression, the local timber industry had almost ceased to exist and that the export of forest produce had decreased compared with the previous year, but there was a substantial revival in 1933.

An encouraging feature of the trade has been a considerable increase in the amount of Mvule (Iroko) timber exported to Europe, and it is anticipated that the trade in this timber will continue to improve.

The total recorded exploitation of forest produce sold and issued free is given below for this year, last year and the peak year 1929:—

<i>Kind of Produce.</i>	1929.	1932.	1933.
Timber, c. ft. to nearest 100	381,700	148,200	123,274
Fuel, stacked c. ft. to nearest 1,000 c. ft.	10,608,000	4,655,000	4,527,000
Poles, to nearest 100	1,820,200	1,430,800	1,510,000
Bamboos, to nearest 100	139,800	868,700	854,400
Withes, to nearest 1,000 (Mangrove and Wattle mostly)	3,166,000	4,470,000	4,703,000
Mangrove Bark tons	3,408	591	3,115
Lianas, for native hut building "	166	259.33	318
Raffia fibre "	6.25	5.5	3.5
Seed cwt.	56.5	5	29.7
Tree Fern Fronds headloads	42,230	60	—
Gum Copal "	299	55	104
Gum Arabic "	1,016	978	911

The total consumption for the year dropped from 4,142 tons in 1932 to 3,835 tons and reflects the stagnation of the building and joinery industries. But the use of local wood continued to prevail over the use of imported material (64 per cent. of the total consumption being local produce, whilst if plywood and pulp boards, which cannot yet be manufactured locally, are excluded, the volume of imported timbers is less than half of that of locally-produced timbers). The annual decrease in timber consumption since 1930 has been as follows:—

1930-1931, 5,994 tons; 1931-1932, 192 tons; 1932-1933, 307 tons.

3. ANIMAL HUSBANDRY.

Two-thirds of Tanganyika Territory are at present unsuitable for stock-raising owing to the existence of tsetse flies. Within the remaining one-third the distribution of domestic animals is remarkable; some areas, usually the driest, are so heavily stocked that during some months of each year the cattle are starved, whereas other parts, often well-watered and well-grassed, carry very few animals; the result in each case is an insufficient supply of milk to meet the full dietary requirements of the owners throughout the dry season, and it is only during a few months of the year that surplus milk is available anywhere for the production of ghee for sale.

The reason for this is simple: More than 99 per cent. of the stock are native-owned, and the native husbandman is only capable of maintaining healthy flocks and herds on land the vegetation of which is indicative of arid or sub-arid conditions and therefore unsuited to ticks, flies and worms, against the ravages of which he is helpless without European aid. Because of this and because the native stock-owner likes to possess large numbers, the inevitable trend of unaided native animal husbandry is towards extremes of over-stocking and under-stocking. It is the main aim of the Department of Veterinary Science and Animal Husbandry to correct this extremely uneconomic distribution by checking the ravages of disease in the under-stocked areas and by encouraging the free marketing of surplus animals in the over-stocked districts.

The latest stock census figures are: cattle, 4,850,000; sheep, 1,900,000; goats, 2,800,000; pigs, 5,000; donkeys, 55,000; horses, 100, and mules, 50. Compared with previous figures these suggest that the rapid increase which took place after the war has ceased; in fact, during the last two years numbers have fallen.

Even as things are, animal husbandry fills a very important place in the lives of the natives of many tribes; to nomadic pastoral people such as Masai, stock are the sole form of wealth, and the direct source of most articles of diet, while to many others who combine pastoral pursuits with agriculture, animals play a large part in tribal ceremonies and mitigate food shortage when

crops fail. By the sale of animals and animal-products, native stock-owners are able to obtain the cash necessary for their needs. Even to-day, the trade is of considerable magnitude, as the following export figures show:—

	1931.		1932.		1933.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
		£		£		£
Hides	1,950 tons	74,653	2,622 tons	95,939	3,888 tons	153,898
Skins	165 "	11,305	100 "	4,698	260 "	11,484
Ghee	5,862 cwt.	11,549	7,171 cwt.	16,848	9,604 cwt.	19,586
Sheep and Goats ...	4,225	1,903	4,831	1,763	2,854	777
Other Animals ...	1,008	3,925	781	1,757	68	161

Thus in one year, £185,000 was obtained for exported animal produce, of which sum more than half went to the native producer. But the value of internal trade, by means of which cash passes from densely populated consuming areas to the stock-raising districts, is probably even greater. In all important cattle areas there exist markets which are appointed and supervised by the Veterinary Department, and during 1933, approximately 100,000 head of cattle, as well as sheep, goats and donkeys, were sold on these markets.

The development of this internal marketing system is one of the most important functions of the department concerned; what is aimed at being the provision of cheap healthy meat to all, the provision of essential cash to all pastoralists. A large turn-over, which tends to reduce numbers in over-stocked areas, rather than high prices, is aimed at. The average price of slaughter cattle marketed in 1933 was only about 16s. each.

Considerable attention is being given to the improvement of hides and skins: the native is being taught to avoid indiscriminate branding, to remove the hide carefully immediately after death, and, if possible, to dry the hide in the shade. The chief way in which these lessons are taught is by grading hides before they are sold in the more important markets, and explaining to disappointed sellers the reasons why their hides were put into 3rd or 4th grades. Increased facilities are being given for shade-drying of hides, and the percentage of exported hides which are shade-dried, although still less than 10 per cent., is steadily rising.

Improved production and marketing of ghee proceeded apace during 1933. Particular attention is being paid to opening up Native Authority ghee factories where standardized methods produce an article of high quality, from milk brought each morning by children of neighbouring native stock-owners. These children take back the skim milk, and the certified product has so far found a ready sale among the Europeans and Indians of the Territory.

The Territory is self-supporting in fresh meat, fresh milk, poultry and eggs, but considerable quantities of butter, cheese, hams, bacon, tinned milk and tinned meat are imported. The replacement of these by home-grown articles offers a certain amount of inducement to Europeans to embark on stock-farming. To assist these pioneers with practical advice and provision of stock, the Government is carrying out much research in breeding and feeding cows, pigs and fowls.

Many diseases exist to harass the stock-owner, although, as has been pointed out, these are more prevalent and serious in under-stocked than in over-stocked areas, doing practically nothing towards reducing the ills of over-stocking but accentuating the poverty resulting from under-stocking. The cattle diseases of outstanding importance are rinderpest, contagious bovine pleuro-pneumonia, East Coast Fever, trypanosomiasis and anthrax, but only against the first two is continuous and unrelenting warfare waged at present.

4. MINERALS.

A general systematic geological survey of Tanganyika Territory has not yet been completed, but the topographical survey of mineralised areas, in preparation for geological survey, is gradually being extended. The Geological Survey Department have published bulletins on the Ruhuhu Coalfield and the Lupa Goldfield and preliminary short papers on the diamond fields. Gold, salt, tin, mica, and diamonds are being exploited, and coal, nickel, manganese, graphite and asbestos are known to exist.

Gold.—Tanganyika is perhaps the largest undeveloped goldfield known in the world to-day. Exports of unrefined gold bullion have been:—

Year.	Quantity.	Value.
	Ozs.	£
1929	10,536	38,630
1930	12,977	47,013
1931	15,200	60,183
1932	30,881	149,864
1933	39,533	201,866

This production is from less than 10 per cent. of the known occurrences. With improvement in communications capital is being attracted. The gold occurs in several administrative districts:—

Musoma District.—There are no big ore bodies but small and medium-sized mines are developing.

Mwanza District.—Some big pyritic ore bodies are being developed in the banded iron-stones near the shores of Lake Victoria. This field is little prospected and there is ample scope for further discovery.

Mkalama District.—The old Sekenke mine is being re-equipped, and new occurrences are being reported near the railhead of the Kinyangiri branch line.

Mbeya District.—This contains the well-known Lupa Goldfield. There are still prospects for diggers with some capital and a knowledge of dry-blowing. For the reef mines there are hundreds of square miles of promising country open to pegging. A new road from Tabora has greatly cheapened supplies; and internal roads on the field are accelerating development. Several mining companies are acquiring and developing mines in this field.

Gold prospects are also being examined in Maswa, Kwimba, Shinyanga, Dodoma, Manyoni, Iringa, Rungwe, Morogoro, Songea, and Kilwa Districts.

Diamonds are found in Mabuki and Shinyanga, where operations are carried on by several European companies. Production and exports have been declining in recent years.

Salt.—Considerable quantities of salt are collected by natives from the saline deposits of Singida, Balangda, Eyasi, and other lakes. In 1932 production included 3,600 tons by Nyanza Salt Mines, Limited; and 3,007 tons by numerous salt works on the coast. In 1933, 7,209 tons were produced of which 6,664 tons were sold for £32,262.

Tin.—Tin is found in the Bukoba District, alluvial deposits being worked by small producers. In 1931 21 tons were exported, valued at £1,780; in 1932 70 long tons, valued at £8,893, and in 1933 80·5 long tons, valued at £12,213. Most of this ore goes to Singapore for smelting. Investigations of the tin areas are being carried on by the Central African Exploration Company.

Mica.—The mining of mica in the Uluguru Mountain, the chief source of this mineral in the past, was practically at a standstill during 1931 but the export of mica increased during 1932 to 12·04 long tons (value £3,806); in 1933 it dropped to 10·69 long tons (value £2,629). Other known mica fields are Sibwesa in Kigoma Province, Mkulwe in Mbeya District, and Kihurio in Pare District.

5. FISHERIES.

A considerable fishing industry exists in the Territory which is conducted almost entirely by natives. The number of persons and vessels engaged are only approximate as only canoes and persons fishing from declared ports are now required to be registered, and it is therefore difficult to obtain reliable information regarding numerous villages along the coast.

The number of persons returned as engaged in fishing is natives 4,470 and foreigners 25; the number of boats engaged is 2,023. In 1933 3,197 tons of fish were landed valued at £22,047. Bêche-de-Mer caught at Tanga, Kilwa, and Mikindani is exported to Hong Kong and Zanzibar.

B.

FOOD SUPPLIES.

The Territory is self-supporting, so far as essentials are concerned, with the exception of a few items mainly for non-native consumption such as wheat, butter, potatoes, sugar, and tea, but in times of drought or visitations from locusts there is sometimes famine in certain areas and food has to be imported. It could be made self-supporting (except for sugar) in one season by organization, without any serious dislocation of the economic life of the community. All the supplies mentioned above are readily obtainable from Kenya.

The value of such food imports in 1933 amounted to over £145,000 as under:—

		Quantity.	£
Wheat Grain	 cwt.	6,893	3,967
Wheat Flour	 "	52,031	30,096
Maize	 "	56,441	10,670
Maize Meal and Flour	 "	18,832	5,056
Rice	 "	6,334	4,395
Ham and Bacon	 "	590	3,616
Butter	 "	1,161	6,769
Cheese	 "	353	1,976
Coffee	 "	76	389
Fresh Fruit	 "	—	1,123
Ghee	 cwt.	1,774	6,264
Garlic and Onions	 "	8,764	3,174
Potatoes	 "	10,678	2,140
Spices	 "	4,451	7,177
Sugar	 "	59,178	58,243
			£145,055

A good deal of the food imported, such as sugar, butter, bacon, ham, rice, ghee, etc., comes from the neighbouring territory of Kenya or from India.

VI.—Industry.

No exact details regarding industrial activities in the Territory are available but below are given such particulars as are available. The list does not include coffee or coffee-curing establishments which are mentioned under Agriculture.

Industry.	No.	No. of persons employed.
Cotton Ginneries	34	2,449
Oil Mills(a)	30	108
Rice Mills	16	435
Flour Mills	36	163
Soda and Ice Factories	36	123
Lime Burning Factories	15	78
Furriers	1	14
Saw Mills(b)	16	128
Salt Works	5	372
Furniture Makers	14	134
Printing Presses	4	63
Sugar Factories	1	15
Manufacturing Jewellers	14	60
Soap Factories	9	36
Cigarette Factories	1	123
Vulcanising Factory	1	7
Brick Works(c)	2	6
Meat Factory	2	99
Tea Factories... ..	3	44
Sisal Factories	80	13,334
Ghee Factory	1	3
Brewery	1	38

With the exception of the cotton, coffee, and sisal industries the bulk of the commodities are for local consumption.

VII.—Other Economic Activities.

(i) ENTREPÔT TRADE.

There is a little entrepôt trade with Zanzibar and other East African territories and the Belgian Congo and until recently there was a very considerable transit trade with the Belgian Congo by the Central Railway through Dar-es-Salaam. Under the Anglo-Belgian Convention of 1921 (Cmd. 1327) the Belgian Government has leased sites at Dar-es-Salaam and Kigoma over which this traffic passes without interference by the Tanganyika Customs. This transit trade has fallen off owing to the opening of the Benguela Railway, by which much of the copper from the Belgian Congo is now shipped, and to the reduced output and trade depression in that territory.

Figures are:—

	1931.	1932.	1933.
	£	£	£
Transit trade	464,366	115,120	12,798
Re-exports	245,441	166,794	182,716
Bullion and specie	63,658	44,956	46,978
	309,099	211,750	229,694

(ii) TOURIST TRAFFIC.

Tanganyika is admittedly one of the finest hunting grounds for big game in the world, and contains an abundance of game of all species. With the advance of civilization, however, the tendency of the game is to withdraw to areas less accessible to man or unsuitable for cultivation, and it is within those natural parts that the Government hopes to preserve the fauna for posterity. Quite apart from the excellent and intriguing bush-shooting and the fine heads that can be obtained, a special feature of the Territory has been made the subject of world-wide publicity. This feature is the Serengeti Plains of the Territory which extend roughly from the great Rift Wall westward towards Mwanza. The Tanganyika Big Game and Tourist Organization has organized a regular service from Arusha to show tourists the vast Ngorongoro Crater and the Serengeti Plains, where wild lions even may be seen and photographed coming to feed on call. Full particulars of time and cost can be obtained from the above Organization (Ray R. Ulyate, P.O. Box 88, Arusha).

The game laws are administered by a Game Warden, with headquarters at Arusha in the Northern Province, and his assistants. Game and birds, which are protected by law, may only be shot under licence; a resident's full licence for one year costs £10, and a visitor's £75. Licences valid for 14 days are granted to visitors for £10. Special licences are required to shoot elephant and giraffe. The number of head and species which may be shot on a licence is liberal.

(a) In some cases includes Soap Factories.

(b) In some cases includes Furniture Makers.

(c) Includes cement-block making.

VIII.—Communications.

(i) *Internal Communications*.—The railways of Tanganyika Territory (all Government-owned) are of metre gauge and consist of:—

(a) The Northern Railway running from the port of Tanga to Arusha (273 miles). This line connects at Kahe with the Kenya and Uganda Railways;

(b) The Central Line, from Dar-es-Salaam to Kigoma on Lake Tanganyika, with a branch from Tabora to Mwanza on Lake Victoria and another branch from Manyoni northwards to Kinyangiri in the Mkalama plateau (1,103 miles in all).

The Tanganyika Railway Administration and Compagnie des Chemins de Fer Congo Supérieur aux Grands Lacs Africains operate steamer services on Lake Tanganyika, the Tanganyika Railways to the south (Northern Rhodesia) and Usumbara (north) and the Belgian Administration to Albertville and the north (Usumbara).

Lake Victoria is served by steamers of the Kenya and Uganda Railways and Harbours.

The road system consists of:—

	Miles.
(1) Township Roads	193
(2) District Headquarter Roads	92
(3) Main Roads	2,649
(4) District Roads Grade A	818
(5) District Roads Grade B	9,904
Total	13,656

The maintenance of roads under Classes (1), (2), (3) and (4) is carried out by the Public Works Department while roads under (5) are maintained by the District Administrations. The differentiation, however, between main roads and Grade A district roads is based more on the lines of future development than on difference in the quality of the road surfaces, the general policy being to aim at providing main roads with permanent bridges up to a twelve-ton standard (moving load) and a good and permanent culvert and drainage system while leaving district roads, for the present at any rate, with temporary bridges of timber. Both main and district roads are mostly earth roads unsurfaced and transport over them is liable to interruption during heavy rains. There are no macadamised roads except in townships.

The Carriage of Goods by Motor (Control) Ordinance, 1931, which sought by means of high-priced licences to afford some measure of compensation to Government for the loss of revenue to the railways resulting from the licensed traffic and at the same time to discourage such competition, was an experimental measure which proved unsuccessful. The Ordinance was repealed in 1934 and there was substituted for it the Carriage of Goods by Motor (Prohibition) Ordinance 1934, which is designed to prohibit absolutely the competition of motor traffic with the railways on certain scheduled roads. This Ordinance will expire at the end of 1935 unless it is renewed, and a full enquiry into the whole question of competition between road and rail transport and the possibility of co-ordinating the various forms of transport in the Territory is being held in the meantime.

Air services are being increasingly used in internal communications and aerodromes have been established at many of the more important centres. Wilson Airways Limited of Nairobi operate a regular weekly service from Nairobi to Dar-es-Salaam in connexion with Imperial Airways Services, and maintain at Dar-es-Salaam two aeroplanes which are in constant employment both by the Government and the public. The total number of miles flown within the Territory during the year was 215,000.

(ii) *External communications* are mainly by water and air, although a certain amount of motor traffic passes southwards to the Rhodesias and South Africa and northwards through Kenya to the Sudan by the Great North Road which crosses the territory from south-west to north-west.

The principal seaports are Dar-es-Salaam and Tanga, other ports being Lindi, Kilwa, Mikindani, Bagamoyo, Kwale, Pangani, and Tirene Bay. Kigoma is the port and railway terminus on Lake Tanganyika.

Dar-es-Salaam is a regular port of call for the vessels of all the shipping lines serving the East Coast of Africa. The Union Castle Steamship Company and the British India Steam Navigation Company each operate a four-weekly service to and from the United Kingdom while the latter maintain a fortnightly service between Bombay and Durban. Dar-es-Salaam is also included in the services of the Messageries Maritimes (Weekly), the German East African Line, the Holland Africa Line and the Italian Line (each monthly). There are services to the Dutch East Indies by the K.P.M. Line; to Japan by the Osaka Shosen Kaisha; and to the United States of America by the Ellerman and Bucknall Line (monthly).

Tanga is also a port of call for most of the above lines and calls are made at Lindi and Mikindani by cargo steamers when there is sufficient cargo offering.

The British India Steam Navigation Company maintain a coastal service by small steamers between Lindi, Mikindani, Dar-es-Salaam, Tanga, and Mombasa.

Both Dar-es-Salaam and Tanga are lighterage ports; they are under the control of the Railway Administration and landing and shipping services are performed by contractors under agreement. At Dar-es-Salaam there is a lighterage wharf 1,446 feet long, equipped with cranes and transit sheds with a total floor area of 99,283 square feet. Of the new 682 feet length of wharf a length of 100 feet gives a depth of 12 feet at L.W.O.S.T. and allows small coastal vessels to berth alongside. There is also a 50-feet passenger pier and a 160-feet dhow jetty. At Tanga there is a 600-feet wharf equipped with cranes and shedding 38,837 square feet in area, while surveys have been completed for further extensions there.

The number and tonnage of Steam Vessels entering the coastal ports during the year were:—

				Entered.	
				No.	Tonnage.
Dar-es-Salaam	...	...	...	518	1,451,372
Tanga	...	...	...	416	750,302
Lindi	...	...	...	142	222,734
Mikindani	...	...	...	100	157,651
Other ports	...	...	...	147	59,754
Total	...	...	...	1,323	2,641,813

The foregoing includes the coasters calling at Moa, Rufiji Delta, Kilifi, Mohoro, Kipumbwe, Ruvu, Mbweru and Ndundu.

Air communications are maintained by Imperial Airways weekly service to and from South Africa, Moshi, Dodoma, and Mbeya being points of call. A feeder service is also operated between Nairobi and Dar-es-Salaam connecting with the main weekly arrivals from England. The following are the statistics of aircraft arrivals and departures from and to other countries during 1933.

				Aircraft.	Passengers.	Goods and Mails, lb.
Arrivals	...	...	...	385	868	11,798
Departures	...	...	...	385	787	9,135

IX.—Customs Tariff.

Ordinance No. 1 of 1930 brought into effective operation a common tariff designed to meet the present needs and conditions in the three territories of Tanganyika, Kenya, and Uganda.

(i) *Import duties.*—There are specific duties on certain goods and *ad valorem* duties on certain other goods varying between 10 per cent. and as much as 62½ per cent. in the case of tobacco. All other goods except those specifically exempted from duty, pay an *ad valorem* duty of 20 per cent.

Certain goods are dutiable either at specific or *ad valorem* rates, depending upon which rate yields the higher duty.

Suspended duties at specific rates or at *ad valorem* rates varying between 10 per cent. and 20 per cent. can also be imposed on certain goods and are so imposed at present. The items involved are the protected articles, such as bacon and ham, butter, cheese, rice, ghee, sugar, etc.

(ii) *Imperial Preference.*—Tanganyika is included in the Conventional Basin of the Congo, and in view of the international agreements relating thereto, it is not possible to adopt a policy of Imperial Preference. Moreover Article VII of the Mandate requires the Mandatory to ensure to all nationals of States members of the League of Nations complete economic, commercial, and industrial equality.

X.—Trade Representatives, etc.

His Majesty's Eastern African Dependencies Trade and Information Office, established at Grand Buildings, Trafalgar Square, London, W.C.2, is charged with the dissemination in the United Kingdom of information regarding East Africa, including Tanganyika, and the stimulation of East African trade in the United Kingdom. The office is under the control of a Commissioner, who is assisted by an Advisory Committee, and is under the joint control of the Governments of the East African territories.

The United Kingdom Government has a Trade Commissioner in East Africa who is responsible for Tanganyika as well as for Kenya, Uganda, and Zanzibar.

NORTHERN RHODESIA.

I.—Situation, etc.

Situated in the heart of Africa, Northern Rhodesia lies on the watershed of the Congo and the Zambezi.

The country comprises an area of about 290,323 square miles (185,807,100 acres) and is bounded on the north-west by the Belgian Congo, on the north-east by Tanganyika Territory, on the east by the Nyasaland Protectorate, on the south by Southern Rhodesia, the Bechuanaland Protectorate, and the mandated territory of South West Africa, and on the west by Portuguese West Africa (Angola). It lies between longitudes 22° E. and 33° 33' E. and between latitudes 8° 15' S. and 18° S.

Northern Rhodesia has three large rivers, the Zambezi, the Kafue, and Luangwa, the three valleys of which lie between 1,000 and 3,000 feet above sea level. In addition, the head waters of the Congo are in the country, where they are known successively as the Chambezi and the Luapula.

With the exception of the Luangwa Valley which lies between 1,000 and 2,000 feet and the Zambezi and Kafue Valleys the whole of the territory is above 4,000 feet. Parts of it, namely the Tanganyika plateau and the plateau lying between Serenje and Mpika, are over 5,000 feet above sea level.

Of the total area (185,807,100 acres) of land surface only 8,763,634 are alienated, 71,532,000 are native reserves and 100,499,776 unalienated. The figures of alienated land include 6,400,040 acres granted under the concession to the North Charterland Exploration Co. (1910), Ltd., and the British South Africa Company's Tanganyika Estate in the Tanganyika Province 2,758,400 acres. The native reserves figures include approximately 1,094,475 acres in the Tanganyika Estate (British South Africa Co.), approximately 2,227,000 acres in the North Charterland Concession and 36,819,200 acres in Barotseland. The figures for forest area are:—

Total acreage 112,640,000 acres, of which 14,080,000 acres are estimated to be under commercial timber.

There are considerable climatic differences between various parts of the Protectorate. In parts of the Zambezi and Luangwa Valleys during the hottest season of the year in October and November before the rains break, extreme heat is the rule. On the highest parts of the plateau near Abercorn the thermometer seldom reaches 100° F. and during the cold season frosts are sometimes experienced. Generally speaking the climate is extremely pleasant and healthy at all altitudes over 4,000 feet.

The rainy season usually begins in November and continues till March, the wettest months being January and February. April produces less severe storms and it is not at all uncommon for rain to occur in May. June, July, August, and usually September are rainless months. In September or October a few thunder-storms occur in preparation for the long rains in November. The annual rainfall varies from place to place but is nowhere very large. The usual figures are between 25 and 50 inches *per annum*.

The following table shows the most significant figures for 1933, at the stations shown:—

Station.	Height above sea level. Feet.	Monthly maximum.		Monthly minimum.		Rainfall inches.
		Highest. Fahr.	Lowest. Fahr.	Highest. Fahr.	Lowest. Fahr.	
Livingstone	3,000 approx.	96·6 Oct.	79·2 June	66·8 Nov.	47·9 July	17·30
Broken Hill Observatory ...	3,908	89·8 Oct.	74·4 July	65·0 Nov.	48·9 May	36·97
Mazabuka Research Station ...	3,400	93·4 Oct.	76·9 July	66·7 Nov.	52·2 May, June	(Records incomplete)

II.—Population.

The following table shows the number of non-natives in the Protectorate at the census of the 5th May, 1931, with the comparative figures for 1921:—

		1921.			1931.		
		<i>Males.</i>	<i>Females.</i>	<i>Total.</i>	<i>Males.</i>	<i>Females.</i>	<i>Total.</i>
Europeans ...	...	2,263	1,371	3,634	8,766	5,080	13,846
Asiatics ...	...	55	1	56	144	32	176
Coloured ...	...	77	68	145	208	217	425
		2,395	1,440	3,835	9,118	5,329	14,447

Occupations of adult male Europeans were classified in the 1931 census as follows:—

Agriculture	544	Commerce	608
Mining and quarrying ...	825	Metal-working	999
Transport, etc.	730	Industrial	1,368

At the end of 1933 the European population was 11,278, an increase of 725 or 6·87 per cent. over the figure for 1932. To a large extent the increase may be ascribed to the reopening of Mufulira Mine and the greater activity in the mining area generally.

The estimated Asiatic population at the same date was 179.

The census did not extend to the native population. The estimated native population at the 31st December, 1933, was 1,371,213. In the report of the Census Commissioner in 1921, the native population was stated to be 979,704.

During the year ended 31st December, 1933, 801 immigrants entered the Territory. There is no record of the number of emigrants from the Territory, but it must have been fairly considerable; the number of emigrants in 1933, however, was substantially below the 1932 figure.

A comparison of the number of the persons in paid employment in 1921 and 1931 is given below:—

Nature of Employment.		1921.	1931.
Domestic	...	3,815	11,471
Farm	...	13,843	14,158
Factory and workshop ...	...	178	1,567
Building and allied trades ...	...	1,149	6,658
Shop, Store, Office	...	513	3,049
Hotel and Boarding House ...	...	—	1,104
Railways	...	1,417	5,473
Mines	...	2,534	20,734
Saw-mills and Timbers	...	131	2,805
Government Service	...	2,108	6,896
Teachers	...	1,122	1,393
Sundry	...	7,883	3,958
		<u>34,693</u>	<u>79,266</u>

III.—Finance.

A. CURRENCY AND BANKING.

1. The Bank Notes and Coinage Ordinance, 1931, Bank Notes and Coinage (Amendment) Ordinance, 1933, and Proclamation No. 3 of 1933 established the following currencies as legal tender throughout the Protectorate at par:—

- (a) Promissory notes of the Bank of England payable on demand.
- (b) Bank notes issued by the Standard Bank of South Africa, Ltd., and Barclays Bank (Dominion, Colonial, and Overseas) payable at their offices at Salisbury, Southern Rhodesia.
- (c) The standard coinage from time to time in use in England.
- (d) Silver coins issued by the Government of the Colony of Southern Rhodesia, for any amount not exceeding £2 sterling in value.

2. The Standard Bank of South Africa, Ltd., and Barclays Bank (Dominion, Colonial, and Overseas) operate in the Territory and have branches or agencies in the following towns:—

- (a) Standard. Livingstone, Lusaka, Broken Hill, Ndola, Mazabuka, Nkana, Luanshya, Mufulira.
- (b) Barclays. Livingstone, Lusaka, Broken Hill, Ndola, Fort Jameson, Luanshya (2), Nkana, Mufulira.

A Government Post Office Savings Bank was instituted in 1925 and at the 31st March, 1934, there were 1,117 depositors, the total amount standing to their credit being £19,495.

The Government has made advances to Municipalities and Management Boards, etc., for various local undertakings such as light and water schemes, native compounds, sanitation, etc. The net amount of such advances outstanding on the 31st of March, 1934, was £37,555.

Certain advances have also been made to approved settlers to assist cotton, tobacco, and general agricultural development.

B. PUBLIC FINANCE.

1. *Public Debt.*

Inscribed stock was issued in 1932 and 1933, viz.:—

(a) £1,250,000 5 per cent repayable 1950-1970. Issued January, 1932.

(b) £1,097,000 3½ per cent. repayable 1955-1965. Issued February, 1933.

These are Trustee securities subject to the restrictions set forth in the Trustee Act, 1925.

Interest payable in 1934 amounted to £100,895 subject to certain anticipated Interest Grants from the Colonial Development Fund and Beit Railway Trustees. Sinking Fund Deposits, which will not be less than 1 per cent. per annum, have not to be provided until 1935-1936.

2. *Revenue.*

Until the 31st of March, 1933, the financial year of the Protectorate ended on the 31st of March. A special accounting period of nine months then followed. From the 1st of January, 1934, the financial year will be identical with the calendar year.

(A) *Analysis of Revenue (on basis of Estimates for 1934).**Self-balancing Departments.*

	Revenue £	Expenditure. £	Surplus + or Deficit—
Post Office	47,500	43,578	+ £3,922
Ndola Electricity and Water Undertakings	11,905	12,554	— £649
Net Surplus £3,273.			

(B) *General Revenue.*

	£	Percentage.	£	Percentage.
1. Customs and Excise—				
Import duties	225,000	38·1		
Export duties	300	—		
Excise	22,400	3·8		
Other	300	—		
			248,000	41·9
2. Native Tax			112,350	19·0
3. Income-tax			80,000	13·5
4. Licences and other internal revenue			58,650	9·9
5. Miscellaneous and other revenue			89,579	15·1
6. Surplus on self-balancing Departments			3,273	0·6
			£591,852	100
Revenue of self-balancing Departments set-off against expenditure			56,132	
Receipts from Colonial Development Fund			16,610	
			£664,594	

(B) Approximately half the customs and excise revenue is collected by His Majesty's Government in the Union of South Africa at the Union ports of entry and remitted to the Protectorate Government. It is therefore impossible to analyse this revenue.

3. *Analysis of Expenditure for 1932-33.*

	£	Percentage.
1. Deficit on self-balancing Department	—	—
2. Debt charges	81,015	12·8
3. Administration	267,781	42·5
4. Economic Development	64,159	10·2
5. Social Services	131,433	20·8
6. Defence	22,231	3·5
7. Pensions and gratuities	64,189	10·2
	630,808	100
Expenditure of self-balancing Departments set-off against Revenue	56,132	
Expenditure on account of Colonial Development Fund ...	16,610	
	703,550	

4. *Revenue Funds, etc.*

The excess of Assets over Liabilities amounted to £109,518 at 31st March, 1934.

5. *Grants-in-Aid.*

(a) Grants-in-aid were paid by the Imperial Treasury up to 1925. The grants made have been repaid and no further assistance has been or is expected to be necessary.

(b) Grants received from the Colonial Development Fund during the year ended 31st March, 1934, were as follows:—

	Amount of Grant. £	Description.
Geologist	4	Sale of Stores in Northern Rhodesia.
Ecological Survey	1,715	Free Grant.
Colonial Veterinary Scholarships	109	"
Geodetic Survey	1,250	"
Forestry Staff... ..	503	"
	3,581	

IV.—Trade Statistics.

(Note.—Northern Rhodesia being divided into two different areas for customs purposes, the Congo basin area and the Zambezi basin area, it is not possible to arrange these statistics in the standard form.)

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1929	456,876	203,549	261,495	926,823*
1930	529,657	203,944	166,959	909,541*
1931	321,607	282,732	606,448	1,213,831*
1932	781,777	294,021	1,629,887	2,705,685
1933	1,190,234	214,851	2,342,269	3,747,354

(ii) (a) *Domestic Exports by Classes, 1933.*

	£
Class I	58,442
Class II	56,810
Class III	3,455,284
Class IV	11,220
Class V	6,853
Total	3,588,609

* Includes exports by Parcel Post as follows:—

1929 ...	£4,903	1930 ...	£8,981	1931 ...	£3,044
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(b) Countries of Destination of Exports.

	£
United Kingdom	1,179,525
Union of South Africa	60,325
Southern Rhodesia	18,766
Rest of Empire	194
Total Empire	1,258,810
Germany	1,111,999
United States of America	449,043
Italy	276,673
France	196,215
Holland	158,497
Belgium	119,180
Other foreign countries	18,192
Total foreign countries	2,329,799
GRAND TOTAL	3,588,609

(iii) Principal Domestic Exports, 1933.

Article.	Quantity.	Value £	Principal countries of destination with amounts in £'000.
<i>Class I.</i>			
Tobacco, unmanufactured	964,155 lb.	35,196	United Kingdom (16), Union of South Africa (15), Southern Rhodesia (4).
<i>Class III.</i>			
Copper, Blister	115,434 tons of 2,000 lb.	3,114,099	Germany (1,037), United Kingdom (942), United States of America (443), Italy (273), France (196), Holland (158), Belgium (64).
Zinc Ingots	18,396 „	275,834	United Kingdom (184), Germany (63), Belgium (24).

IMPORTS.

(i) Total Imports (including Bullion and Specie) from:—

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Grand Total. £
1929	1,532,863	1,008,396	1,061,158	3,602,417*
1930	2,018,099	1,395,062	1,449,561	4,862,722*
1931	2,256,029	1,520,085	1,329,326	5,105,440*
1932	597,346	797,096	470,460	1,864,902*
1933	646,494	836,079	448,956	1,931,529*

(ii) (a) Imports by Classes, 1933.

	£
Class I	322,985
Class II	137,741
Class III	1,471,005
Class IV	98
	1,931,829

(b) Countries of origin of Imports.

	£
United Kingdom	646,794
Union of South Africa	404,540
Southern Rhodesia	346,261
Canada	36,736
India	27,056
Rest of Empire	21,486
Total Empire	1,482,873
United States of America	180,824
Germany	50,219
Dutch East Indies	38,643
Japan	36,799
Belgium	18,908
Belgian Congo	12,641
Other foreign countries	110,922
Total foreign countries	448,956
GRAND TOTAL	1,931,829

* Includes imports of Government Stores and bullion and specie, not classified by countries of origin, as follows:—

	Government Stores. £	Bullion and Specie. £		Government Stores. £	Bullion and Specie. £
1929	24,990	42,241	1932	69,058	25,595
1930	69,792	21,206	1933	40,592	7,769
1931	214,559	12,315			

(iii) *Principal Imports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Value. £</i>	<i>Principal countries of origin with amounts in £'000.</i>
<i>Tobacco—</i>				
	Cigars, etc.	1,531 lb.	913	
	Cigarettes	93,508 lb.	47,011	Southern Rhodesia (45), United Kingdom (2).
<i>Other—</i>				
	Manufactured	44,360 lb.	5,504	Southern Rhodesia (5).
	Unmanufactured	25 lb.	3	
		139,424 lb.	53,432	
	Ale, Stout, Beer, etc.	75,065 Imp. gal.	37,119	Southern Rhodesia (36), Union of South Africa (6).
<i>Spirits—</i>				
	Whisky	15,650 gal.	24,418	United Kingdom (24).
	Other Kinds	5,173 „	5,865	
		20,823 „	30,283	
	Wheaten Flour and Meal	884 tons	21,606	Southern Rhodesia (20).
<i>Class II.</i>				
	Coal, etc.	194,259 tons of 2,000 lb.	97,204	Southern Rhodesia (97).
	Wood, unmanufactured	432,215 cubic feet.	29,264	Canada (10), Southern Rhodesia (7), United States of America (6).
<i>Class III.</i>				
	Ammunition and explosives (all kinds).		247,932	Union of South Africa (231), United Kingdom (15).
<i>Machinery and parts—</i>				
	Mining		116,961	United Kingdom (33), Switzerland (29), United States of America (23), Germany (22), Union of South Africa (8).
	Electrical		48,302	United Kingdom (32), United States of America (13).
	Other kinds		35,766	United Kingdom (17), United States of America (9).
			201,029	
	Iron and Steel manufactures, other	—	123,643	United Kingdom (90), Sweden (11).
	Apparel		111,468	United Kingdom (56), Southern Rhodesia (18), Union of South Africa (17), Japan (13).
<i>Piece-goods (excluding canvas bagging & sacking)—</i>				
	Silk, and Artificial Silk... ..	—	12,291	Japan (5), United Kingdom (5).
	Other	—	98,687	United Kingdom (77), Japan (8), India (7).
			110,978	
<i>Oils—</i>				
	Motor Spirit	827,295 gal.	59,432	Dutch East Indies (34), United States of America (20).
	Lubricating	89,583 gal.	14,210	United States of America (9), United King- dom (4).
	Illuminating	83,202 gal.	6,752	United States of America (4), Dutch East Indies (2).
	Power Paraffin	25,705 gal.	1,872	United States of America (1).
		1,025,785 gal.	82,266	
	Motor Cars, Trucks, etc., and parts	—	78,870	United Kingdom (37), United States of America (17), Canada (15).
	Bricks, building and fire	—	32,435	Austria (10), United Kingdom (9), United States of America (5), India (5).
	Millinery, etc., Haberdashery, Drapery, etc.	—	28,865	United Kingdom (20), Japan (3).
	Footwear	66,538 pairs	25,983	United Kingdom (14), Union of South Africa (9).
	Blankets, Rugs, etc.	—	21,565	Belgium (13), Italy (4).
	Cement	4,678 tons	19,772	Southern Rhodesia (18).

V.—Natural Resources.

A.

The resources of the Protectorate are principally mineral, and other forms of production are of secondary importance.

1. AGRICULTURE.

European crop-production is confined mainly to the supply of the internal market and, to a lesser extent, of that of the Katanga province of the Belgian Congo. Owing to the geographical position of the Protectorate only the more valuable products can stand the cost of transport to external markets. The only product regularly exported overseas is tobacco, but coffee is likely to enter the market in small but increasing quantities as estates come into bearing. No records of the nature or extent of native cultivation are available.

The following table illustrates the relative importance of the major crops grown by Europeans and the recent trend of production.

Year.	Maize.		Tobacco.		Wheat.		Groundnuts.	
	Acres.	Production. Tons.	Acres.	Production. 000's of lb.	Acres.	Production. Tons.	Acres.	Production. Tons.
1929-30	47,085	18,014	3,487	1,318	2,095	856	2,213	448
1930-31	42,974	17,291	2,328	951	1,594	502	1,334	270
1931-32	42,757	26,400	2,472	1,185	2,261	1,015	526	118
1932-33	34,036	10,900	2,236	1,267	2,271	1,034	944	93

Maize is the most important crop in the railway belt. The only variety grown by Europeans is "flat white". The small acreage planted in 1932-33 was due partly to fear of continued over production and partly to a difficult planting season, while the short crop is to be attributed largely to the abnormally early cessation of the rains and partly to locust damage in some areas. The average yield for the whole territory is usually between 800 and 1,000 lb. per acre but a reasonable expectation of crop on well farmed land would be between 1,400 and 1,800 lb. The most important producing districts are Mazabuka, Lusaka, and Chisamba. Eighty per cent. of the settlers' maize is handled by the North Western Rhodesia Farmers' Co-operative Society. This Society at present holds long-term Government and Mines contracts. Profitable maize production is limited by internal demand as, at present prices, export is uneconomical. There is a general, though slight, increase in the amount of maize fed to stock, but the greater part of the crop is grown for human consumption.

Tobacco.—Virginian tobacco is produced in the Fort Jameson district and, to a lesser extent, on the railway line. 400,000 lb. are annually exported to the Union of South Africa free of duty under a quota system, and Southern Rhodesia manufacturers have recently agreed to purchase leaf annually to the amount imported from that territory in manufactured form during the previous year. The remainder is exported either overseas or to the Union of South Africa on payment of import duty. The tobacco industry is still suffering from the disastrous effects of the slump following the boom of 1926 and 1927 but appears to be recovering slowly. Flue cured leaf of excellent quality is produced at Fort Jameson and on suitable soils in the railway belt, while in the Luangwa Valley sun curing is practised on a small scale. At the present time tobacco is unquestionably the most promising of export crops, and since crops able to bear the expense of export are very few indeed, the industry is of first importance to the future of Northern Rhodesian agriculture.

The quantity and value of the exports of unmanufactured tobacco for the years 1929-1933 were as follows:—

	Country of Destination.									
	United Kingdom.		Nyasaland.		Southern Rhodesia.		Union of South Africa.		Total.	
	lb.	£	lb.	£	lb.	£	lb.	£	lb.	£
1929*	1,146,032	44,910	89,261	3,390	—	—	399,870	21,572	1,649,540*	70,310*
1930	518,298	20,068	150,955	5,675	416	15	626,315	31,405	1,295,984	57,163
1931	329,225	13,012	120,892	4,585	100	8	429,195	15,741	879,412	33,346
1932	744,471	27,290	—	—	510	14	325,864	11,905	1,070,845	39,209
1933	423,547	16,193	3,337	125	138,360	3,980	398,911	14,898	964,155	35,196

* In 1929, 14,107 lb., valued at £438, were exported to the Belgian Congo.

Customs returns do not distinguish between flue-, fire-, air- and sun-cured tobacco, nor do the crop returns until the year 1933. The production of flue-cured and air- and sun-cured Virginia tobacco in the season 1932-33 was as follows:—

	Flue-cured.		Air- and sun-cured.	
	Acres.	Yield. lb.	Acres.	Yield. lb.
1933	1,969	1,123,600	267	143,000

Wheat is grown in the dry season, almost exclusively under irrigation. Lusaka is the only important producing district. Yields average between 800 and 1,000 lb. per acre. Almost the whole crop is milled and consumed in the territory.

Groundnuts are grown on a small scale in the railway belt but the prices obtained are barely remunerative and production has decreased in recent years.

Coffee growing is practically confined to the Abercorn district and is still an infant industry. The Blue Mountain variety is the most popular. The majority of estates are small and are only just coming into bearing. The coffee produced is of excellent quality and the small consignments which have already reached the market are regarded as equal to the finest East African.

The available figures with regard to acreage, production and export of coffee are shown below:—

Year.	Acreage.		Production (approx.).		Exports to the United Kingdom.	
	Bearing.	Not Bearing.	Cwt.	Cwt.	£	£
1931	140	349	120	—	—	—
1932	118	348	29	37	133	—
1933	256	268	150	166	316	—

Fruit.—Citrus fruit is grown with success under irrigation. There are few large estates but the majority of farmers plant small orchards. Half the trees in the territory have yet to come into bearing. Fruit is sold almost entirely for local consumption. Export overseas would be somewhat precarious and almost impracticable in the absence of a centrally situated co-operative packing factory. Deciduous fruit is of little economic importance as successful cultivation is confined to a few specially favoured situations.

Market Gardening has increased in recent years to meet the local demand for vegetables. It is practised as a sideline on several farms near consuming centres and has developed considerably in the Lusaka district where irrigation facilities exist.

Native crop production is confined almost exclusively to the supplying of the producers' needs, and no native produce is exported. The amounts of native grain traded are not accurately ascertainable but probably vary between 20 and 40 thousand bags of 200 lb. per annum. Maize-growing for sale tends to increase in native reserves adjoining the railway belt.

The principle crops are maize, kaffir corn, bullrush millet, finger millet (in north-eastern districts), cassava, and pulses.

The need for a cash crop is very great and a slight improvement in world prices might render the development of a native export trade possible in certain commodities. The three great obstacles to development are cost of export, lack of communications, and the sparse and scattered nature of the population.

2. FORESTS.

It is estimated that there are approximately 176,000 square miles of woodland in Northern Rhodesia of which 54 per cent. are the property of the State. Some 33,000 square miles of State woodlands are so situated as to warrant protection to ensure the regulation of water supply, prevention of erosion and conservation of timber and fuel supplies. A further 2,800 square miles are worthy of development and management for the production of commercial timber. Trees enter largely into the system of native agriculture and it is estimated that the native population annually consumes roughly 160 million cubic feet of timber as fuel and in the practice of shifting cultivation.

The principal markets of the territory are for constructional (mining) timbers and for railway sleepers. The mining industry consumes a large proportion of the timber consumed annually by the territory as a whole. Few softwoods and no coniferous timbers are available from forests within the territory, and these classes, for which high prices are paid, are imported largely from countries outside the British Empire. Experiments are being conducted in introducing and growing exotic softwood species with a view to supplying this demand, but there is no likelihood of achieving this aim for a considerable time to come.

A commercial concern is exploiting on a considerable scale the teak (*Baikiaea plurijuga*) forests in the Livingstone district, and exports railway sleepers to South Africa. Bloodwood (*Pterocarpus angolensis*) and Mupumena (*Entandrophragma candatum*) are used locally as furniture woods and the local utilization of other indigenous species is receiving increased attention.

3. ANIMAL HUSBANDRY.

Cattle raising is an important industry among Europeans in the Territory. Cattle, sheep, pigs, and goats are also reared by the natives in various parts of the territory.

The cattle industry has been built up under the protection given by disease restrictions, by reason of which live animals have been excluded. That the industry, built up under protection, will be able to meet the cold blast of free imports, should this happen again in the near future, is open to grave doubts. The local cattle trade, as it is at present, is not well organized to meet serious competition. The supply of well-conditioned animals is irregular and the proportion of younger and better quality slaughter stock bred on European-owned farms is comparatively small. Until 1914 outside competition was unknown. Outbreaks in the south of East Coast fever had caused a total embargo to be placed upon all cattle, except that for breeding purposes which could undergo a period of quarantine. In those years most of the slaughter cattle came from Barotseland, about 75 per cent. therefore were native bred. The outbreak of pleuro-pneumonia in 1914 shut off Barotseland. A period of high prices due to war conditions then commenced. At a later date, importation from N'gamiland was sought for and sanctioned.

In 1922 it was possible to relax the restrictions on Southern Rhodesian cattle and to allow them to pass through Northern Rhodesia to the Belgian Congo. It is not known what prices were paid for these cattle but the prices at which Northern Rhodesia cattle were offered mostly failed to attract the Congo buyers. The situation then became serious for the territory. Just in time, mining development progressed at such a rate that large numbers of European and native labour were required. An unthought of market opened in the territory, prices rose and competition at auction sales became evident.

The Customs Agreement between the Protectorate, Southern Rhodesia, and South Africa allows any food-stuffs to enter any territory from the others free from duty. The position regarding East Coast fever in Southern Rhodesia was such that cattle from certain centres could not be prevented from entering Northern Rhodesia; prices for Southern Rhodesia stock were so low that Northern Rhodesia stock-owners could not compete and large numbers of local cattle remained unsold.

In 1931 prohibition was placed on the importation of Southern Rhodesia stock owing to the outbreak of foot and mouth disease in that country, the prohibition also covered 1932 but in this latter year 6,391 head of cattle were imported from the Union of South Africa valued at £26,640.

The approximate number of live-stock in the territory at the end of 1933 was :—

					European-owned.	Native-owned.
Cattle	...	...	...	...	40,620	402,172
Sheep	}	...	...	...	11,061	145,057
Goats		...	...	...	5,518	35,241
Pigs	...	...	...	...	46	—
Horses	...	...	...	...	8	—
Mules	...	...	...	...	405	417
Donkeys	...	...	...	...	127,658	582,887

The exports of cattle and cattle products for 1931, 1932 and 1933 are set out below :—

			1931.		1932.		1933.	
			Quantity.	£	Quantity.	£	Quantity.	£
Cattle for slaughter	...	number	2,318	15,099	2,379	9,224	1,000	4,169
Hides and skins—								
Ox and cow	...	tons	315	12,026	160	3,598	99	3,159
Other kinds	...	...	—	7,603	—	4,788	—	5,155
Animal, agricultural, and pastoral products			—	362	—	947	—	562

4. MINERALS.

The Protectorate is fortunate in possessing a large mineralized area of high economic value.

Ndola may be said to be the centre of the principal mining area, and the chief ore of the territory is copper. The origin of the industry, as it exists to-day, may in large measure be traced to the Bwana Mkubwa copper property. One of the events in the earlier history of the territory was the finding of the Kansanshi mine by Mr. George Grey in 1899 but it was not until 1923 that serious development commenced on the copper deposits and particularly on mines the existence of which had previously been proved. Already over 400,000,000 tons of copper-bearing ore, giving on an average 5 per cent. copper, the greater part of it clean sulphide-ore which presents no metallurgical difficulty, has been proved.

Adequate capital has been provided for the development of the mines, which have been equipped with the very latest and most up-to-date machinery, with the result that they are able to produce copper at a profit at a figure as low as £21 a ton. Model mining villages have been laid out complete with electric light and indoor sanitation, the villages are equipped with hospitals, schools, etc. The health and welfare of the workers, both European and native, are thoroughly well catered for. In particular the Ross Institute and Hospital for Tropical Diseases was asked to send out specialists to advise on what steps should be taken to deal with the malaria question, and as a result of their advice being taken the incidence of malaria has been most materially reduced. Altogether the situation is as unlike the development of other important mining areas in olden days as could be imagined, to the very great advantage of the Northern Rhodesia copper area.

By December, 1931, both the Roan Antelope Copper Mines, Ltd., and the Rhokana Corporation, Ltd., were at work producing copper and the Mufulira Copper Mines, Ltd., were also on the point of producing. There had been a heavy fall in the demand for copper and in consequence copper prices had collapsed to such an extent, that large stocks of copper had accumulated in the copper-producing countries of the world (none of which, however, had been produced in Northern Rhodesia) and an international meeting of copper-producers was called to try and regulate the output of copper. The Northern Rhodesia Companies took part in the meetings and as a result a voluntary curtailment of the world's copper production was made effective from the 1st January, 1932, under which the output was limited to 26½ per cent. of the estimated productive capacity. As a direct result of this, development on the other copper mines of the territory was for the time being shut down, the Mufulira Copper Mines, Ltd., agreed that the quota allotted to them for 1932 should be produced by the Roan Antelope Copper Mines and the Rhokana Corporation, Ltd., and in consequence of this arrangement the starting up of the Mufulira plant was postponed.

The restriction scheme above referred to came to an end on the 31st December, 1932, and the negotiations conducted for its continuation broke down, with the result that all companies are now free from any restrictions.

Since the beginning of 1933 the output of copper has steadily increased; the Directors of the Mufulira Copper Mines, Ltd., decided to reopen the mine, and it commenced production on the 1st October, 1933.

As a direct result of all this development a new company known as British Copper Refiners, Ltd., was created at Prescott, Lancashire, where the copper from the Roan Antelope Mines will be refined. The refinery is the only works of its kind in Great Britain, and has an initial capacity of 1,000 tons weekly. At present nearly all the copper produced in the Protectorate is fire-refined on the spot and exported in the form of blister copper (99·4 per cent. fine and upwards), but so far most of it has been sent to the United States of America for electrolytic refinement there.

The erection of this factory has a very important bearing on the copper position, as, almost immediately after the restriction of output had been made, the United States of America put a prohibitive duty of 4 cents per lb. on copper imported into the United States of America which practically closed that market.

A further development during 1933 was the decision to construct a modern plant for the electrolytic refinement of copper at Nkana. A refinery capable of dealing with 3,000 tons of copper a month has been constructed and was brought into operation towards the end of 1934.

Other important minerals are also produced in the territory.

The Rhodesia Broken Hill Development Co., Ltd., closed their zinc plant and lead smelters during 1932 owing to unsatisfactory prices, but as the result of highly important discoveries of vanadium bearing laterites on the property, the opening up, mining, and milling were commenced in the middle of 1931 for the marketing of both fused vanadic oxide and vanadium concentrates.

Production of vanadium is controlled ; considerably larger outputs might be obtained were it not feared that the market could not assimilate larger quantities. The electrolytic zinc plant resumed operations on the 1st January, 1933, and the production has reached about 1,600 tons a month.

Gold is being produced by the Luiri Gold Areas, Ltd., and the New Jessie Mine (Jessie D. B. Location).

Extensive prospecting work is being carried out by the Rhokana Corporation, Ltd., the Luangwa Concessions, Rhodesia Minerals Concessions, the Kafue Copper Development Co., Ltd., Kosonso Syndicate and Stella Mines, Ltd.

The following table shows the total mineral production of the Protectorate during the years 1931, 1932, 1933 and 1934 :—

	Quantity.				Value.			
	1931.	1932.	1933.	1934.	1931.	1932.	1933.	1934.
					£	£	£	£
Gold Oz.	9,364	6,349	2,588	2,113	39,776	26,969	10,994	14,511
Silver "	548	339	25	187	33	26	2	16
Copper, fire refined Tons	8,927	67,887	104,204	137,295	346,278	2,995,215	3,402,896	4,147,086
" electrolytic "	—	—	—	602	—	—	—	18,848
" concentrates "	24,110	—	—	—	459,194	—	—	—
" other ... "	3,215	—	—	—	8,183	—	—	—
Zinc "	6,927	—	18,541	19,540	81,767	—	291,764	265,698
Manganese ore ... "	1,467	—	5,367	2,041	2,201	—	8,051	3,062
Iron ore "	759	711	—	—	379	355	—	—
Vanadium								
concentrates "	703	—	—	—	94,424	—	—	—
Vanadium ... lb.	335,971	676,806	79,153	7,129	225,662	439,924	51,449	4,634
Mica "	3,098	—	3,333	2,179	774	—	500	327
Cobalt "	—	—	260,941	1,280,002	—	—	79,065	320,000
Lead Tons	—	—	73	184	—	—	839	1,952
					1,258,671	3,462,489	3,845,560	4,776,134

The total value of minerals produced since 1906 in Northern Rhodesia amounts to £19,359,059.

5. FISHERIES.

Sun-dried fish is a common article of native trade throughout the Protectorate even at considerable distances from the source of supply. Native fish-trappers maintain a very fair supply from December to April. The industry continues to be an important one, but is not at present as lucrative as in past years owing to the financial difficulties of the times and the lack of organization and the crude methods of curing employed by those engaged in the industry. Restrictions imposed on the transport of fish and other native merchandise on account of the existence of foot and mouth disease in Northern Rhodesia have also militated in no small degree against the prosperity of the industry.

A large number of native canoes are used in the fishing industry but there are no means of ascertaining the exact number.

Similarly no statistics are available of the number of persons engaged in fishing, or the quantity or value of the catch. The varieties of fish most commonly caught by natives are tilapia, mud fish, barbel and kindred lung fish of many species. There are also tiger-fish and, in Lake Tanganyika, the Nile perch.

B.

FOOD SUPPLIES.

The rural native population is entirely self-supporting. The importation of food-stuffs is now mainly for non-native consumption and has decreased considerably both on account of decrease in the non-native population and by reason of increased internal production, but the territory is still far from being self-supporting.

Northern Rhodesia is unlikely to become self-supporting for many years in respect of such manufactured products as jams, biscuits, and confectionery. Sugar and tea will always be imported. The chief imported plant product is wheaten flour and some imports of wheat or blended flour will always be necessary. Additional milling facilities would probably reduce the present scale of importation. Sufficient citrus fruit and coffee should be available for the entire internal demand in a few years time. Deciduous fruits will always be imported. Most of the remaining imported plant products could be produced locally though possibly not at prices competitive with those of the surpluses exported from the south. Of animal products local dairy and allied produce lags far behind the internal demand but the recent opening of a co-operative creamery may, in time, rectify matters.

In general it may be said that production slightly below the internal consumption is the ideal position for the Northern Rhodesian farmer, for any surplus he produced would not only cause local prices to slump but could not be exported except at a loss.

The following table shows the principal items of food-stuffs imported into the Protectorate in 1933. Most of these are supplied from Southern Rhodesia and the Union of South Africa:—

	£
Wheat flour	21,606
Butter	17,330
Meat and meat fats	17,140
Sugar	12,085
Condensed and preserved milk	12,062
Eggs... ..	9,782
Confectionery	9,151
Pickles, jams, etc.	7,443
Fresh fruit	6,620
Biscuits, cakes, etc.	6,085
Fruit, dried and preserved	5,981

The total value of all food-stuffs imported in 1933 was in the region of £194,000.

VI.—Industry.

In the strict sense of the word there are practically no industrial establishments or manufactories in the Protectorate other than those engaged in preparing the natural products of the Protectorate for export.

The extensive mining establishments have already been described.

One large saw-mill is established at Livingstone, the average numbers employed during 1933 being 58 Europeans and 1,544 natives. The output during 1933 was 649,855 cubic feet. No information regarding value at works is available.

The Mulungushi dam costing over £1,000,000 has been built and an extensive electric generating plant erected for the supply of electricity (the Mulungushi Power Plant and Installation).

No statistics are available with regard to such industries as mineral water-factories, printing presses, tanneries, brick works, lime-burning factories, salt works, furniture-makers, vulcanizing factories, soap factories, etc.

VII.—Other Economic Activities.

(i) *Entrepôt Trade*.—There is practically no entrepôt trade but there is a certain amount of transit trade chiefly with the Belgian Congo, Southern Rhodesia, and the Union of South Africa. No statistics of this trade, however, are available.

(ii) *Tourist Traffic*.—No statistics regarding the value of this traffic are available. Apart from tourists who pass through the Protectorate in transit between the South and East African territories, a certain number visit the Protectorate to see the Victoria Falls the largest falls in the world, a mile and a quarter across with a sheer drop of 400 feet.

VIII.—Communications.

Railways.—Northern Rhodesia is served by the main line of the Rhodesia railways which enters the territory at the Victoria Falls and runs north-north-east to Sakania on the Belgian Congo border where it connects with the Belgian Congo system. The length of main line within Northern Rhodesia is 515 miles; branch lines run from Ndola to Roan Antelope Mine (26 miles) and also to Mafulira (82 miles) via Nkana (41 miles).

The railways are all of the standard South African gauge—3 feet 6 inches—and are administered by the Rhodesia Railways, Ltd., as part of their system, which serves also Southern Rhodesia and connects on the south with the South African Railways and on the north with the “Bas Congo et Katanga” Railway. Northern Rhodesia has therefore direct railway connexion with the sea eastwards to Beira, southwards to Union of South Africa ports, and westwards *via* the Belgian and Benguela Railways to Lobito Bay in Portuguese West Africa.

Roads.—In the absence of branch railways Northern Rhodesia has had to develop its internal communications largely by roads and an extensive road system has been built up connecting most of the principal centres. Practically all the roads are earth roads liable to be interrupted during the heavy rains, but much has been done in recent years in constructing permanent bridges and improving surfaces and many of the main roads are passable practically all the year round.

The most important road in the territory is that which is known as the Great North Road. It enters Northern Rhodesia from the south by way of the Victoria Falls Bridge and after running parallel to the railway as far as Kapiri Mposhi strikes north-eastward to Abercorn and the Tanganyika border, a distance of almost 1,000 miles.

Abercorn is also connected by road with Mpulungu (25 miles) at the south end of Lake Tanganyika which is a port of call for the Lake Tanganyika steamer service.

Another important road runs eastwards from Lusaka through Petauke to Fort Jameson connecting these with the road to Nyasaland, and there are a number of other roads. The roads of the Protectorate are divided into two classes, trunk roads with a total mileage of 2,176 miles, and main, district, and branch roads with a total mileage of 4,825 miles.

Water Transport.—Rapids and falls prevent the rivers of Northern Rhodesia being used to any large extent as means of transport and there are no lakes of any considerable size. To Barotseland in the west, however, the main means of communication is by the Upper Zambezi which with two short portages, is navigable for canoes and barges from Kazungula, about 50 miles above the Victoria Falls to the Sapumba Rapids. The Kafue, Luapula, and Chambeshi are also navigable for small craft over considerable distances.

Air Transport.—Broken Hill and Mpika are ports of call on the Imperial Airways South African service and a number of aerodromes have been established at other points in the territory. A local aviation company operates services as required and the air is being increasingly used for passenger work both internally and to other parts of Africa. The principal aerodromes are Livingstone, Lusaka, Broken Hill, Mpika, and N'dola while smaller aerodromes exist at Mazabuka, Solwezi, Kasempa, Fort Jameson, Mongu, and Abercorn.

IX.—Tariff.

For customs purposes Northern Rhodesia is divided into two zones known as the Congo and Zambezi Basins.

The Congo Basin can roughly be taken to be all the territory north of a line drawn from Fife in the north-east, to the border where the territory joins the south-east corner of the Belgian Congo. The remainder of the territory to the west and the south constitutes the Zambezi Basin. The Zambezi Basin is by far the more important part of the territory industrially and more than 90 per cent. of the total trade is transacted in this area.

The Zambezi Basin area is subject to Customs Agreements with Southern Rhodesia, the Union of South Africa, British Bechuanaland Protectorate, Basutoland, and Swaziland.

The Agreements provide in general for considerable rebates upon interchange of local manufactures, and for free interchange of raw products with limitations in regard to leaf tobacco.

The Congo Basin part of the territory is within the area defined by the Berlin Conference of 1885 and in view of the international agreements relating thereto, it is not possible to adopt a policy of Imperial Preference.

(i) *Import Duties.*—There are specific duties on certain goods and *ad valorem* duties on certain other goods varying from 5 per cent. to as much as 30 per cent.

All other goods unless specifically exempted from duty pay an *ad valorem* duty of from 10 per cent. to 20 per cent.

(ii) *Imperial Preference.*—In the Zambezi area Imperial Preference is granted. Dutiable goods of Empire origin pay reduced duties or are admitted free; the margin of preference varies but in the case of the general rate on goods not specifically charged or exempted it is 10 per cent. *ad valorem*. In the Congo Basin area, as already indicated, the grant of preference is not possible.

X.—Trade Representatives, etc.

His Majesty's Eastern African Dependencies Trade and Information Office (Grand Buildings, Trafalgar Square, London, W.C.2) was established in London in 1925 to disseminate in the United Kingdom information regarding East Africa and to stimulate trade by helping to introduce its products into the home market. The Office is under the control of a Commissioner, who is assisted by an Advisory Committee.

Northern Rhodesia is included in the area of His Majesty's Trade Commissioner at Johannesburg whose address is P.O. Box 839 Johannesburg.

NYASALAND.

I.—Situation, etc.

The Protectorate of Nyasaland consists of a strip of land to the west and south of Lake Nyasa, lying approximately between latitude 9° 45' and 17° 15' S. and longitude 33° and 36° E. The Protectorate is about 520 miles long and from 50 to 100 miles in width and its total area is approximately 37,596 square miles of land, and approximately 10,353 square miles of water; the most southerly point is about 130 miles from the sea in a direct line. To the west lies Northern Rhodesia, to the north and north-east Tanganyika, and to the south Portuguese East Africa.

The dominant feature in the physiography of the country is the deep, trough-like depression, forming part of the Great Rift Valley, which traverses it from end to end; the greater part of this trough is occupied by Lake Nyasa and the remaining part by the Shire River Valley. The country on either side of the trough is made up of high plateaux, that lying west of the Lake standing mainly between 3,300 feet and 4,400 feet above sea level. Near Dedza it rises to about 5,000 feet and towards the northern end of the Lake the Vipya, Nyika, Mafingi, and Misuku uplands rise to altitudes of 6,000 to 7,500 or even 8,000 feet. South of the Lake the Shire Highlands plateau is surmounted by the Mlanje Mountains rising to nearly 10,000 feet and the Zomba massif to about 7,000 feet. Lake Nyasa stands at an elevation of about 1,520 feet and the adjacent lake plains rise to about 1,700 feet; the southern part of the rift, occupied by the Lower Shire, stands at only 200 to 300 feet above sea level.

Of the total land surface of about 25,000,000 acres, only 4,015,547 have been alienated. The figures for forest areas are:—Estimated total acreage 2,899,300 of which 19,500 acres are estimated to be under commercial timber.

The climate is preponderatingly of the tropical monsoon type which is locally modified by the numerous mountain ranges and upland plateaux. The pronouncedly wet summer and early autumn are followed by a winter and spring which are generally dry and cold. Abnormal precipitation, however, is met with in the cold season near such mountain ranges as Mlanje and Cholo, and it

makes a considerable difference to crop adaptation. It may be said that, in the cold season from May to September when the southerly winds commence to blow strongly, the weather is almost perfect and helps to make a good "man climate" for much of Nyasaland. Indeed, throughout the year in most highland areas the very hot nights which reduce the vigour of Europeans in the tropics rarely occur and only in the low-lying districts of the Shire River and along the shores of Lake Nyasa during the months of September, October and November is there very trying heat. The table presented indicates the variations in rainfall and in temperature during 1933 in the various regions. The temperatures may be taken as typical of the various stations.

Station.	Height above sea-level.	Absolute maximum.	Absolute minimum.	Mean maximum.	Mean minimum.	Rainfall in 1933. inches.	Average rainfall over 20 years. inches.
Mzimba	4,700	89	48	81·4	59·9	28·58	31·9
Dowa	4,600	95	46	78·7	63·5	32·92	33·9
Blantyre	3,500	93	49	77·8	60·0	40·77	49·1
Lilongwe	3,400	91	40	77·9	56·6	31·34	33·4
Zomba	3,020	93	45	79·2	60·1	41·29	51·5
Thornwood, Mlanje	2,200	102	48	81·3	62·2	49·81	79·7
Chinteché	1,800	99	38	87·2	56·9	61·86	67·9
Fort Johnston ...	1,600	103	31	97·2	52·1	25·16	30·5
Liwonde	1,560	98	39	85·4	57·7	23·25	32·8
Port Herald	115	107	38	89·5	68·5	24·86	32·7

II.—Population.

At the census of 1931 the total population was estimated to be 1,603,454, comprising 1,599,888 natives and 3,566 non-natives—1,975 Europeans, 1,509 British Indians, 73 Goans, 1 Arab, and 8 others.

The principal occupations of the adult male European population were the tobacco industry, Christian missions, Government Service, other primary production, and commerce.

About 90 per cent. of the Asiatic population is engaged in commerce.

Accurate statistics of the occupations of the native population are not available. The following statistics are those of natives actually in paid employment in August, 1931:

	Male.	Female.
Skilled native labourers (including clerks, bricklayers, mechanics, etc.)	10,655	204
Unskilled native labourers (including carriers, cultivators, watchmen, etc.)	41,115	4,695
Domestic servants	252	252

It is estimated that 26,242 natives were engaged in 1933 in growing cotton for sale and 46,612 were registered as tobacco growers. About 30,000 were temporarily working outside the Protectorate, chiefly in the Rhodesias and the Union of South Africa. About 10,000 are engaged in the fishing industry.

The following table shows the estimated population at 31st December, 1933:—

	Males.	Females.	Total.
Europeans	1,047	770	1,817
Asiatics	1,240	234	1,474
Natives	757,889	850,134	1,608,023
Totals	760,176	851,138	1,611,314

III.—Finance.

A.—CURRENCY AND BANKING.

1. The currency of Nyasaland is sterling and United Kingdom coins are legal tender to the amounts to which they are legal tender in the United Kingdom.

Bank notes issued by the Standard Bank of South Africa Ltd. and by Barclays Bank (Dominion, Colonial, and Overseas) in Southern Rhodesia are legal tender without limit and silver coins of the denominations of half-crown, florin, shilling, sixpence, and threepence issued by the Government of Southern Rhodesia are legal tender for any amount not exceeding 40s. English Treasury notes, Bank of England notes, and South African bank notes, circulate to some extent but are not legal tender.

The estimated amount of coin in circulation at the end of 1933 was between £180,000 and £200,000.

2. Two British banks maintain branches in the Protectorate:—

Barclays Bank (Dominion, Colonial, and Overseas), Ltd.,
Blantyre,
Limbe.

The Standard Bank of South Africa Ltd.,
Blantyre,
Limbe,
Zomba,
Lilongwe.

3. There is a Government Post Office Saving Bank. On the 31st December, 1933, there were 1,361 depositors and the amount standing to their credit was £27,358.

There are also two Savings Banks established by the two banks operating in the country, viz.:—Barclays Bank (Dominion, Colonial, and Overseas) Ltd., and The Standard Bank of South Africa Ltd. with 460 and 344 depositors respectively and the amounts standing to the credit of these depositors was £15,552 and £14,806 respectively.

B.—PUBLIC FINANCE.

1.—Public Debt.

(a) (i) *Public Loans* totalling £3,570,000 have been issued with the guarantee of His Majesty's Government in the United Kingdom under the Palestine and East Africa Loan Acts, as follows:—

£2,000,000 at 4½ per cent., 1952-72, issued in 1932.

£1,570,000 at 3 per cent., 1954-74, issued in 1934.

(ii) *Exchequer Loans*, owed to the United Kingdom Treasury, are outstanding as follows:—

	Original Amount.	Outstanding at 31-12-33.
	£	£
(a) Redemption of Railway Subsidy Lands (1912)	180,800	130,754
(b) East African Protectorate Loan, Railways and Roads, 1915-1920	45,348	38,954
(c) Loan grants commencing 1921-22 to enable the Protectorate Government to meet payment of guarantee to the Trans-Zambesia Railway ...	1,030,500	976,022
(d) Accrued interest on (c) (non-interest bearing) ...	163,206	163,206
Total outstanding		£1,308,936

(b) *Interest.* (i) Interest on the publicly-issued loans is met, up to £500,000, from Colonial Development Fund grants.

(ii) Interest on the Exchequer Loans was provided as follows in 1934:—

	£
Loan (a)	6,328
(b)	2,190
(c)	50,817

The interest on (c) was, however, offset by an equivalent loan-in-aid from the United Kingdom (forming an addition to (d) above).

(c) *Sinking Fund.* (i) Sinking fund payments in respect of the Public Loans are to commence on 1st April, 1935.

(ii) Provision was made in 1934 for sinking fund payments as follows in respect of the Exchequer Loans:—

	£
(a)	2,043
(b)	800
(c) and (d)	Nil.

2.—Revenue.

(a) *Analysis of Revenue (on basis of Estimates for 1934).*

Self-balancing Department.

	Posts and Telegraphs.
	£
Revenue	18,410
Expenditure	22,280
Deficit	£3,870

General Revenue (excluding receipts from Colonial Development Fund and loans and grants in respect of Trans-Zambesia Railway).

	£	Percentage.
1. Customs	140,916	39·2
2. Hut Tax	132,020	36·5
3. Licences, Income-tax, and other internal revenue	46,485	13·0
4. Fees of Court	18,380	5·3
5. Miscellaneous	20,977	6·0
	358,778	100
Revenue of self-balancing Department set off against Expenditure	18,410	
Total	377,188	

(b) Analysis of Customs revenue collected in 1933.

			Class I.	Class II.	Class III.	Class IV.	Total.
			£	£	£	£	£
United Kingdom	...	...	16,860	—	19,321	4,632	40,813
Rest of Empire	...	...	1,698	2	7,021	748	9,469
Foreign countries	...	...	5,968	2	65,980	578	72,528
Total	...	...	24,526	4	92,322	5,958	122,810

3.—Analysis of Expenditure (on basis of Estimates for 1934, excluding Loan and Colonial Development Fund expenditure).

			£	Percentage.
1. Deficit on self-balancing Department (see 2 (a))	...	...	3,870	1.0
2. Public Debt Charges	...	...	62,078	15.2
3. Administration	...	...	159,877	39.2
4. Economic Development	...	...	58,896	14.5
5. Social Services	...	...	68,600	16.8
6. Defence	...	...	19,351	4.7
7. Pensions and Gratuities	...	...	35,060	8.6
			407,732	100
Expenditure of self-balancing Department set off against Revenue	...		18,410	
Total	...		426,142	

4.—Reserve Funds, etc.

The Protectorate has no special Reserve Funds but at the 31st December, 1933, it had an estimated excess of assets over liabilities of £104,735.

5.—Grants-in-aid, etc.

Grants-in-aid were paid by the Imperial Treasury down to 1912-13 and again in 1916-17 but no grants-in-aid have since been given to the Protectorate.

Since then the Protectorate has been self-supporting, except in meeting the Trans-Zambesi Railway Guarantee. This amount stands as a loan to the Protectorate and is to be liquidated by a charge of 7 per cent. per annum by way of interest and sinking fund.

The following assistance to Nyasaland from the Colonial Development Fund has been approved:—

			£
1. Zambesi Bridge and connected works	...	Free grant of interest.	500,000
2. Extension of Veterinary Services	...	Free grant.	5,745
3. Telegraph and telephone development	...	"	9,250
4. Hospital and dispensary improvements	...	"	35,205
5. Temporary staff for development works	...	"	12,150
6. Water supply investigation	...	"	40,180
7. Public Health works	...	"	43,079
8. Telephones	...	"	3,060
9. Further veterinary development	...	"	1,885
10. Agricultural development	...	"	15,000
11. Public Health investigation	...	"	159
12. Geological survey	...	"	9,000
13. Agricultural survey	...	"	2,000
			£676,713

IV.—Trade Statistics.

EXPORTS.

(i) Total Exports (including Bullion and Specie) to:—

			United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
			£	£	£	£
1913-14	...	...	195,550	43,308	27,230	266,088
1930	...	...	667,123	45,928	63,363	776,414
1931	...	...	506,350	33,320	46,734	586,404
1932	...	...	651,099	120,154	17,745	788,998
1933	...	...	559,633	36,464	18,415	614,512

(ii) *Domestic Exports by Classes, 1933.*

To:—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom	446,125	53,371	—	604	500,100
Southern Rhodesia	2,281	1,477	—	2,140	5,898
Union of South Africa	375	26	—	144	545
Rest of Empire	472	8	—	327	807
<i>Total Empire</i>	449,253	54,882	—	3,215	507,350
<i>Total foreign countries</i>	1,964	3,759	—	571	6,294
GRAND TOTAL	451,217	58,641	—	3,786	513,644

(iii) *Principal Domestic Exports, 1933.*

Article.	Total Quantities.	Total Value.	Principal Countries of destination with amounts in £'000.
<i>Class I.</i>		£	
Tobacco	10,394,498 lb.	389,794	United Kingdom (389).
Tea	3,276,477 lb.	59,656	United Kingdom (56) Southern Rhodesia (2).
<i>Class II.</i>			
Cotton	1,082 tons.	50,014	United Kingdom (48), Belgium (2).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913-14	149,120	15,348	44,243	208,711
1930	261,069	159,847	343,517	764,433
1931	304,534	156,362	287,575	748,471
1932	410,152	101,946	228,287	740,385
1933	387,254	104,869	233,131	725,254

(ii) *Imports by Classes, 1933.*

From:—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom	25,554	155	291,229	24,546	341,484
India	1,098	555	16,546	746	18,945
Union of South Africa	1,222	128	9,273	2,285	12,908
Southern Rhodesia	2,572	1,129	8,120	915	12,736
Rest of Empire	2,358	94	7,800	—	10,252
<i>Total Empire</i>	32,804	2,061	332,968	28,492	396,325
Portuguese East Africa	12,087	2,593	88,293	—	102,973
Japan	18	—	77,107	—	77,125
Germany	363	—	15,578	—	15,941
Italy	703	71	8,445	—	9,219
Holland	360	5	7,065	—	7,432
Other foreign countries	2,160	22	14,899	3,149	20,230
<i>Total foreign countries</i>	15,691	2,691	211,389	3,149	232,920
GRAND TOTAL	48,495	4,752	544,357	31,641	629,245

In addition bullion and specie to the value of £96,009 was imported during the year (£45,770 from United Kingdom; £50,028 from other parts of the British Empire and £211 from foreign countries).

(iii) *Principal Imports, 1933.*

Article.	Total Quantities.	Total Value.	Principal countries of origin with amounts in £'000.
<i>Class I.</i>		£	
Spirits	6,761 pf. gals.	10,408	United Kingdom (10).
Sugar	416 tons	4,216	Portuguese East Africa (3).
<i>Class III.</i>			
Cotton Manufactures—			
Piece goods	8,627,856 lin. yd.	126,040	Japan (59), United Kingdom (34), Portuguese East Africa (10), Germany (8), India (6).
Blankets	106,858	9,763	Belgium (2), Holland (2), Portuguese East Africa (2).
Other Kinds		4,372	United Kingdom (2).
		140,175	

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Total Quantities.</i>	<i>Total Value. £</i>	<i>Principal countries of origin with amounts in £'000.</i>
<i>Class III—continued.</i>			
Railway Construction Material		89,022	United Kingdom (86).
Oils—			
Motor Spirit	496,140 gal.	42,385	Portuguese East Africa (all).
Lubricating	32,365 „	6,457	Portuguese East Africa (5), United Kingdom (1).
Illuminating	59,995 „	4,435	Portuguese East Africa (4).
Fuel	13,136 „	509	Portuguese East Africa (all).
	601,636 „	53,786	
Apparel (all kinds)		48,963	United Kingdom (34), Japan (7).
Motor Cars, etc., and parts—			
Motor Cars, Lorries, etc. ...	81	15,345	United Kingdom (9), Canada (3).
Parts (including tyres and tubes).		15,395	United Kingdom (9).
		30,740	
Iron and Steel Manufactures, other.		23,325	United Kingdom (18), Portuguese East Africa (3).
Machinery—			
Electrical and Industrial ...		21,533	United Kingdom (20).
Other		715	
		22,248	
Railway and Tramway Rolling Stock, etc.	134 tons	13,570	United Kingdom (12).

V.—Natural Resources.

A.

1.—AGRICULTURE.

Nyasaland is essentially an agricultural country, agricultural production (including the breeding of livestock) being the principal occupation of both Europeans and natives. A large variety of crops will grow in Nyasaland, but in a general way it may be stated that, of the chief crops, tobacco, tea, sisal, and coffee are grown above 2,000 ft. and cotton below that elevation.

At the end of 1933, 45,500 acres were under cultivation by Europeans of which 7,832 acres were under tobacco, 13,830 under tea, 1,210 under coffee, and 1,500 under rubber. The remaining acreage was under such crops as cotton, chillies, maize, millets, beans, groundnuts, wheat, and potatoes.

No statistics are available for Indian or other Asiatic cultivation but the quantity is very small.

The agricultural production by natives continues to progress but no reliable statistics of cultivation are available. The principal crops grown by natives are tobacco, cotton, groundnuts, maize, rice, millets, capsicums, and chillies.

Owing to the difficulties and cost of transport, production for export by Europeans is mainly confined to crops of which the value per unit of weight is high. Nyasaland does not escape the vagaries of the climate of Eastern Africa and like the neighbouring territories is also subject to periodical visitations of locusts. These pests are not indigenous to the country but come into it via Kenya, Tanganyika, and Uganda, etc., from distant countries such as the Sudan and French possessions in Central Africa, and also from North-Eastern Rhodesia.

The seaport for the exports and imports of the Protectorate is Beira, and the railway from there at present stops at Blantyre; it is, however, being extended to Lake Nyasa, and this extension, when completed, together with the Lake steamer service, will open up the whole of the northern end of the territory. At present all goods in transit to and from the Protectorate have to be unloaded on one side of the Zambesi, placed into barges, which are towed across the river, and loaded into trains on the other side; however, when the bridge over the Zambesi (which is at present under construction) is completed, at some date in 1935, this difficulty will be removed. It is also hoped that eventually the cost of transport will be lowered so as to render the export of further crops an economic possibility.

The following are the principal agricultural crops now produced, roughly in their order of importance, crops grown for export being mentioned first.

Tobacco was first planted in 1889 and exports began in 1893. It is now grown both by Europeans and natives. Flue-cured and air-cured tobacco is the variety mainly grown by the Europeans and dark fire-cured by the natives. Tobacco growing in the Protectorate has suffered in the past from a number of vicissitudes outside the control of the industry but, on the whole, has made continuous progress. At first all the tobacco found a ready market in the Union of South Africa and no serious attempt was made to obtain a footing in the London market, but changes in the Customs Tariff of the Union altered this position and forced the planters to find another export market. In 1908, the Imperial Tobacco Co., Ltd., took an interest in the Colony and established an up-to-date factory at Limbe. During the war production increased and good prices were obtained.

At one time some tobacco was grown on unsuitable soils, but nowadays dark tobacco and, to a less degree, bright tobacco, are grown only in areas very well suited to them. The dark-fired types are pre-eminent among such Empire growths. The work of the Agricultural Department has established a definite Western Dark Nyasa strain which was developed in Zomba in 1927.

The area under tobacco cultivated by Europeans in 1911-12 was 4,507 acres; the areas cultivated during recent years have been as follows:—

											Acres.
1929	...	...	...	...	...	...	...	...	...	...	19,269
1930	...	...	...	...	...	...	...	...	...	...	17,481
1931	...	...	...	...	...	...	...	...	...	...	13,482
1932	...	...	...	...	...	...	...	...	...	...	14,314
1933	...	...	...	...	...	...	...	...	...	...	7,862

Of the 1933 acreage, 5,256 acres were under flue-cured, 1,024 acres under air-cured, and 1,582 under fire-cured tobacco, and the total crop was 20,575 cwt. flue-cured, 4,165 cwt. air-cured, and 6,403 cwt. fire-cured, a total of 31,143 cwt.

The total number of natives registered as tobacco growers in 1933 was 46,612. No accurate statistics are available of the area cultivated by natives, but it is estimated that the area under tobacco in 1933 was over 32,000 acres. Some indication of the increase in production is given by the figures of the total native crop which was only 525 tons in 1924, but increased to 2,414 tons in 1928, 3,519 tons in 1931, and 5,904 tons in 1932, but dropped back to 4,077 tons in 1933.

The gross total crop in 1933 was therefore about 5,634 tons, but there is always an excess of production over actual exports, owing to rejection of part of the crop as below standard and to various other causes. Actual exports during 1933 were about 4,640 tons.

The actual exports during recent years have been as follows:—

Year.	Flue-cured.		Fire- and Air-cured.		Total.	
	'000 lb.	£'000.	'000 lb.	£'000.	'000 lb.	£'000.
1929	2,607	105	7,733	299	10,340	404
1930	2,867	107	10,068	378	12,935	485
1931	2,590	97	8,101	304	10,691	401
1932	2,261	85	12,821	481	15,082	566
1933	1,644	62	8,750	328	10,394	390
1934	2,549	—	9,806	—	12,355	—

(approx.).

The exports of fire- and air-cured can be separated as follows for 1932, 1933 and 1934:—

Year.					Fire-cured.	Air-cured.
					'000 lb.	'000 lb.
1932	...	...	...	...	12,655	166
1933	...	...	...	...	7,926	824
1934	...	...	...	...	8,940	866

(approx.)

Further particulars of the marketing and uses of the various types of Nyasaland tobacco are given in the memorandum on tobacco (page 523).

Tea.—A first unsuccessful attempt to introduce tea into Nyasaland was made in 1878; a second attempt in 1888 succeeded, but production did not become substantial till the beginning of the present century. The tea was planted on the south-eastern slopes of Mlanje, where the rainfall varies from 60 to 120 inches per annum, and the Mlanje area has now become the tea district of the Protectorate, though there has also been some extension from there to the Cholo District. The growing of tea is entirely in the hands of Europeans. Unfortunately in the early stages seed of a low quality *jat* of tea was introduced from Natal and this *jat* has been largely planted in the Mlanje District. Within recent years, however, high quality strains have been imported from Ceylon and India and efforts are being made to acclimatize them. The expansion of tea growing has been slow but in recent years there has been a large increase in acreage and the amount of tea exported, although owing to the severe fall in the prices the total value of exports has actually decreased. Recent statistics are as follows:—

					Acreage.	Tea exported.	Value.
							£
1911-12	...	...	...	...	2,593	43,876	1,097
1929	...	...	...	...	8,866	1,765,419	74,383
1930	...	...	...	...	9,686	1,939,756	56,543
1931	...	...	...	...	11,414	1,963,452	49,129
1932	...	...	...	...	12,596	2,573,871	42,898
1933	...	...	...	...	13,830	3,276,477	59,656

Of the acreage under tea only 8,251 acres were actually plucked in 1933.

Cotton.—Cotton was introduced into Nyasaland as a European crop about the year 1900. It became very popular and in a few years it headed the list of exports in value.

The original cotton was Egyptian and it met with moderate success in the low country. In the Blantyre and Zomba Districts it was replaced by American Upland cotton which eventually spread to lower levels. Cotton is now grown sometimes by Europeans as a rotation crop, but the low returns, due largely to the state of the markets, have led to a general abandonment on European estates. In 1917 the European cotton acreage was 27,342 acres, in 1927 this had fallen to 2,545 acres, in 1931 to 761 acres, in 1932 to 265 acres, and in 1933 to 246 acres.

The Empire Cotton Growing Corporation began work in Nyasaland in 1923 and to its encouragement and that of the British Cotton Growing Association is largely due the recent increase in native production. The Department of Agriculture continues to work in conjunction with these bodies. The type grown is now U4 introduced by the Empire Cotton Growing Corporation from South Africa and equal in quality to American Middling Upland. The proportion of first-grade cotton has increased from 66.84 per cent. in 1926 to 88.61 per cent. in 1930. No accurate statistics of

acreage are available, but it is estimated that in 1933 over 34,000 acres of cotton were cultivated by natives. The native production of seed cotton during recent years has been as follows:—

Year.	Tons.	Year.	Tons.
1911	962	1931	2,477
1929	3,505	1932	2,698
1930	5,448	1933	3,080

Total exports of cotton lint (both European and native produced) during recent years has been as follows:—

	Quantity. lb.	Equivalent to 400 lb. bales.	£
1929	2,121,618	5,304	62,661
1930	3,798,338	9,496	72,881
1931	2,263,728	5,659	37,729
1932	2,094,962	5,237	34,916
1933	2,423,680	6,057	50,014

Hitherto the whole crop has been sent to the United Kingdom, but in 1933 for the first time 275 bales were sent to Belgium. The 1934 crop is estimated at 8,500 bales.

There is a small export of cotton-seed (616 tons valued at £1,232 in 1933).

Rubber.—In 1933 there were 1,500 acres of rubber (*Hevea*) in Nyasaland, all on one estate. The industry is not likely to be extended substantially in the Protectorate and was completely at a standstill in 1931 and 1932 owing to low prices. There was a small recovery in 1933.

Exports during recent years have been as follows:—

Year.	Quantity. Tons.	Value. £
1929	77	3,345
1930	42	1,628
1931	nil	—
1932	nil	—
1933	32	300

Coffee.—Coffee was first introduced into the Protectorate in 1878 and in the year 1891 there was a flourishing industry in the Mlanje District. The industry reached its height in 1900 when 17,000 acres were under cultivation with coffee and 2,000,000 lb. were exported. The limiting factors in coffee production are infestation by white stem borer and insufficiency of suitable soil conditions. *Arabica* is the most suitable kind to grow in the Protectorate. The industry is entirely a European one.

The acreages and exports of coffee during recent years are shown below:—

Year.	Acreage.	Quantity. Cwt.	Value. £
1928	1,281	413	1,542
1930	1,256	962	3,109
1931	1,542	825	1,988
1932	1,449	789	1,840
1933	1,210	357	833

Capsicums and chillies during the past few years have figured to a negligible extent in exports, the quantity in 1932 having dwindled to 239 lb., valued at £3. In 1933, however, export rose to 16,633 lb., valued at £208.

Sisal production has practically come to an end. Although the fibre had a good market at one time and fetched prices equal to that of sisal grown in other East African territories, the industry, owing to heavy transport charges, has practically ceased to exist and it will now be very expensive to bring the estates back into bearing.

Food crops are the main cultivation of the natives. The staple food-stuff is maize, which is grown extensively. It is supplemented by various millets, peas, beans, groundnuts, and rice. Efforts are being made to expand the cultivation of pulses, and to improve the quality of rice produced, but at present the total production of the latter is only a few hundred tons.

There is a small production of potatoes, and velvet bean, pigeon pea, soya bean, and horse gram all grow well in the Protectorate, and other oil-seeds besides groundnuts could be grown. Wheat and barley are grown on a very small scale. No statistics of acreage or production are available.

Small quantities of maize, potatoes, and rice are exported to Portuguese East Africa.

An endeavour is being made to stimulate the production of groundnuts for export. Exports, which were negligible in 1931 and non-existent in 1932, rose to 253 tons, valued at £1,519, in 1933. It is, however, doubtful whether any very large trade can be built up, as long as the present low prices continue.

2. FORESTRY.

The total area of forests at the end of 1933 was estimated as follows:—

Acreage under commercial timber	...	...	...	19,500
„ of other forest lands	...	...	...	2,880,000
Total	...	...	...	2,899,500

In addition to the above area there remain, throughout many of the populated regions, scattered patches of both woodland and young forest re-growth which, in the aggregate, amount to many hundreds of square miles. Most of this land, however, is subjected to periodical agriculture.

The majority of the forest types are composed mainly of inferior species and many consist almost entirely of small trees which are of little value except for providing supplies of poles and firewood. The Protectorate's resources of commercial timbers are therefore very scanty and are mainly confined to a few small mountain forests, to certain types of fringing forest, and to Government and privately-owned plantations.

Thirty-nine State forest reserves have been constituted, with an approximate total area of 2,436 square miles. The majority of the reserves comprise main watersheds and catchment areas, and were constituted primarily in the interests of water-supply and for safeguarding against serious erosion. A scheme of village communal forests, instituted in 1926, shows marked progress and at the end of 1933 there were 2,352 registered areas with an approximate total acreage of 127,913.

In addition to providing for the protection of State and communal forests, the forest laws make provision for the control of cutting and cultivating on the banks of rivers and streams; for the protection of any steep hillslopes which may be specifically ordered by a district commissioner; and for the protection of certain scheduled species of trees growing on Crown lands.

The only forest industry of any importance is the extraction of timber and firewood for local use. Owing to the small size and scattered nature of the blocks of commercial forest there are no forest saw-mills, the trees being converted into timber of portable dimensions by hand-sawing at the place where fellings are undertaken. In the towns, re-conversion into smaller sizes is usually carried out by circular saw.

The chief building timber in use is *Widdringtonia Whytei* derived from small patches of natural mountain forest in Mlanje Mountain Forest Reserve, and from plantations established in Zomba Mountain Forest Reserve, where the species has grown well. Exploitation of this timber is carried out by the Forest Department mainly for Government timber supply, although surplus stocks of seasoned timber are always available for sale to the public at competitive rates. The output of sawn *Widdringtonia* timber was 46,481 cubic feet in 1933; 60,435 cubic feet in 1932; and 28,877 cubic feet in 1931.

The other chief timbers used locally are:—

Khaya nyasica.—A mahogany derived from fringing forest (i.e., along banks of streams). Used mainly for furniture, door frames and window frames.

Pterocarpus angolensis.—Found very scattered in certain types of open deciduous woodland. Used for building construction and furniture.

Eucalyptus saligna and *E. rostrata*.—From Government and private plantations. Used for construction of all kinds.

Used to a lesser extent for construction purposes are *Adina microcephala*, *Afrormosia angolensis*, *Azelia quanzensis*, *Bridelia micrantha*, *Burkea africana*, *Copaifera mopane*, *Cordyla africana*, *Terminalia sericea*, *Uapaca kirkiana*, etc.

Other species of timber value, found scattered in various types of forest but not used to any extent by non-natives, are:—*Albizzia versicolor*, *Combretum* spp., *Erithroploeum guineense*, *Faurea saligna*, *Parinarium mobola*, *Piptadenia buehnanii*, *Sclerocarya caffra*, *Sterculia triphaca*, *Trichilia emetica* and *Vitex cienkowski*.

Although the total annual consumption of local sawn timber probably does not exceed 160,000 cubic feet, there is a very large consumption of timber in the form of poles, particularly by the native population in the building of their huts, which invariably have to be renewed every two or three years, or even annually in some localities. The annual consumption of poles is estimated to be at least 2½ million cubic feet. Much wood is destroyed annually in the periodical re-opening up of land for agricultural purposes.

The annual consumption of firewood is estimated to be about 150 million cubic feet; firewood being the general fuel for domestic use. Large quantities are consumed in tobacco-curing, brick-making, lime-burning, lake transport, etc. Only an insignificant amount of charcoal is manufactured.

Forest plantations have been artificially established both by the Government and by European settlers, the total area exceeding 16,000 acres. Small village forest plantations have also been established by natives in some localities where no natural forest remains. On European estates and in plantings by natives, the chief trees planted are species of *Eucalyptus* and *Cassia siamea*. Government plantations are mainly composed of *Widdringtonia whytei*, *Cupressus* spp., *Callitris* spp., *Eucalyptus* spp., but in addition, small trial plantations and plots have been established at various centres for testing a wide range of exotic species. A great deal of experimental work with indigenous species is also being carried out.

The following table shows the value of wood imports for the last five years. No timber is imported by the Government, which uses only local timber.

	1929.	1930.	1931.	1932.	1933.
	£	£	£	£	£
Unmanufactured	3,652	4,190	2,695	2,479	1,188
Partly manufactured (mainly tea chests) ...	3,307	2,840	2,542	4,671	7,270
Manufactured (Furniture of all kinds) ...	781	1,129	544	1,109	1,214
Totals	7,740	8,159	5,781	8,259	9,672

The following table shows the value of exports of forest produce for the last five years. The timber exports consisted mainly of sawn *Eucalyptus saligna* timber from private plantations, exported to Southern Rhodesia for the manufacture of tobacco hogsheds.

Strophanthus is a minor speciality of Nyasaland (see page 531).

	1929.	1930.	1931.	1932.	1933.
	£	£	£	£	£
Unmanufactured Timber	—	Small value (not recorded)	3,167	3,819	2,069
<i>Strophanthus</i>	888	1,222	1,587	1,140	2,628
Beeswax	1,024	880	1,092	953	1,348
Totals	1,912	2,102	5,846	5,912	6,045

3. ANIMAL HUSBANDRY.

Cattle, sheep, goats, and pigs are reared by the natives in various parts of the Protectorate. In the northern districts of North Nyasa, Mombera, West Nyasa, Kota Kota, and in Southern Angoniland cattle are reared by natives, the greatest numbers being kept by the natives of North Nyasa and Mombera. In the north there is the Wankonde Tribe, a pastoral race, who excel in the care of their cattle, which are small, compact, humped beasts with short horns. The Angoni Tribe in the Mombera District own large numbers of cattle, mainly long-horned Africander type or crosses but their methods of husbandry are much less advanced than those of the Wankonde. A few large areas exist in the territories suitable for ranching under European supervision. There are also vast tracks of country suitable for cattle raising which cannot be used at present owing to the presence of the tsetse-fly.

There is scope in the Dedza, Ncheu, and Neno Districts for sheep raising for wool by Europeans, if this be done on a large scale and under modern methods.

In the Shire Highlands land is too valuable to raise live-stock but owing to the demand for dairy produce the number of Europeans who are building up dairy herds is increasing. Both private persons and the Government have imported breeding animals for building up stock.

At present the only available market for live-stock is within the Protectorate.

The following is the live-stock census for the year 1933:—

Class of stock.	European-owned.	Native-owned.	Total.
Cattle	19,514	180,021	199,535
Sheep	2,293	83,393	85,686
Goats	573	242,301	242,874
Pigs	1,300	68,686	69,986
Horses	5	—	5
Donkeys	195	5	200
	23,880	574,406	598,286

There was considerable improvement in the ghee industry for natives during 1932 both as regards production and quality. The total net production was approximately 10½ tons which is practically double that of 1931. In 1933, however, the quantity fell to 6½ tons.

The volume of trade in hides and skins is small. There is only one buyer in the Protectorate, whose activities are confined to the Blantyre, Limbe, and Zomba Districts.

The chief factors operating against this trade are:—

- (a) depressed state of markets;
- (b) high railway freight between Limbe and Beira; and
- (c) poor quality of produce.

During the years 1930 and 1931 the market was so unfavourable that it was deemed inadvisable to encourage the natives to prepare hides and skins for markets.

Exports decreased from 315 cwt. valued at £1,312 in 1929 to 3 cwt. valued at £73 in 1932, and ceased entirely in 1933.

4. MINERALS.

No complete general geological survey of Nyasaland has yet been carried out.

Early in 1931 the Government decided, as a temporary measure, that the Geological Survey should suspend its ordinary duties and concentrate on the water supplies question with the help of grants from the Colonial Development Fund, but, with the aid of an additional grant from the Colonial Development Fund, it is proposed to examine certain of the mineral resources of the country during the period 1933-35.

The following minerals occur in the country:—gold, copper, lead, iron, ilmenite, mica, corundum, zircon, bauxite, graphite, coal, asbestos, and manganese.

Coal occurs on the western shore of the Lake, also near Chiromo and towards the Portuguese frontier on the west—the latter probably related to the coal deposits about 70 miles further west, near Tete, which are engaging the active attention of two companies at present.

Bauxite occurs on the Mlanje Mountains, but it is doubtful whether it can be mined at a profit.

There are no mining concessions in existence at present; the number of prospecting licences issued during 1933 was ten. Gold, graphite, mica, and asbestos have been worked on a small scale in the past, and corundum and gold are now being worked on a small scale. There were no mineral exports in 1933.

5. FISHERIES.

Considerable supplies of fish are obtained from Lake Nyasa, Lake Nalombe and Lake Shirwa. It is estimated that 10,000 natives are engaged in the fishing industry. The industry is mainly in the hands of natives who catch the fish and sun-dry them for sale to natives in other parts of the Protectorate. Fresh fish is obtainable in townships and settlements throughout the season, the requirements of the European and native consumers are catered for by natives who transport the fish by cycle and motor-cycle, and by Indians using motor lorries.

6. MISCELLANEOUS.

There are small exports of *ivory*, the amount in 1933 being 26 cwt., valued at £1,304.

B.

FOOD SUPPLY.

In the ordinary way, so far as the food supply of the native population is concerned, the country is self-supporting, but in times of drought or locust visitations there is sometimes a shortage of food in certain areas.

Considerable quantities of foodstuffs are ordinarily imported into the territory principally for non-native consumption, most of which could be produced in the country without any dislocation of other work.

The principal foodstuffs imported in 1933 were as follows:—

Article.	Quantities.	Value. £
Salt	2,856 tons.	6,713
Sugar	8,330 cwt.	4,216
Wheat and Wheat Flour	4,802 "	2,386
Fish, canned and dried... ..	304 "	1,475
Hams and Bacon	250 "	1,455
Butter, Cheese, and fats... ..	302 "	1,315
Fruits, canned, etc.	433 "	1,183

VI.—Industry.

There are several soap factories in the Protectorate, the largest of which belongs to the Citrona Soap Company and employs 28 persons. The output during 1934 was 80 tons valued at £2,777. Cigarettes are also made in Limbe and Blantyre and in the Zomba District. Furniture and baskets are made at the Missions and elsewhere and mats and pottery by natives in certain districts.

There are fourteen cotton ginneries in the country but only three of them worked in 1933.

The other industrial establishments are practically all established as part of the agricultural production. The Imperial Tobacco Co., Ltd., have established an important tobacco factory at Limbe. Other companies also have well-equipped factories in the territory. There are also three sisal factories, several coffee factories, and a number of modern and well-equipped tea factories, particularly the one put up by Messrs. Lyons & Co., Ltd.

VII.—Other Economic Activities.

ENTREPÔT TRADE.

There is very little entrepôt trade done from Nyasaland but there is a certain amount of transit trade done chiefly with Northern Rhodesia.

The following table indicates the direction of the transit trade during the last three years:

	1931.		1932.		1933.	
	Tons.	£	Tons.	£	Tons.	£
<i>General Cargoes to—</i>						
Northern Rhodesia	774	45,222	549	28,548	576	29,818
Portuguese East Africa	110	9,438	5	14,014	141	12,611
Tanganyika	11	1,824	355	639	3	459
	895	£56,484	909	£43,201	720	42,888
<i>Produce from—</i>						
Northern Rhodesia	336	28,262	415	34,840	419	35,212
Portuguese East Africa	709	3,083	685	2,849	960	3,328
Tanganyika	—	—	—	—	—	—
	1,045	£31,345	1,100	£37,689	1,379	38,540
<i>Combined Totals—</i>						
Northern Rhodesia	1,110	73,484	964	63,388	995	65,030
Portuguese East Africa	819	12,521	690	16,863	1,101	15,939
Tanganyika	11	1,824	355	639	3	459
	1,940	£87,829	2,009	£80,890	2,099	81,428

VIII.—Communications.

Means of communication in Nyasaland are by railways, roads, water, and air.

RAILWAYS.

Communication with the sea is effected by the Nyasaland Railways and the Central Africa Railway running from Blantyre to the north bank of the Zambesi River and the Trans-Zambesia Railway which runs from the south bank of the Zambesi to Beira. These railways are at present linked by a ferry across the Zambesi River, which is shortly to be replaced by a bridge now under construction. An extension of the railway from Blantyre northwards to Domira Bay on Lake Nyasa was also under construction and opened for traffic in 1934.

Of the Nyasaland Railways and Central Africa Railway, 129 miles lie within the Protectorate and 45 miles in Portuguese Territory while the Trans-Zambesia Railway—156 miles—lies wholly in Portuguese Territory. All these railways are of 3 feet 6 inch gauge and are fully equipped for the conveyance of goods and passengers. They are under one combined management locally and share a common office and management in London.

Nyasaland Railways Ltd., was registered in October, 1930, to acquire the debenture stock and shares of the Shire Highlands Railway Nyasaland Ltd., which had previously owned and operated the line between Blantyre and Port Herald and the greater part of the issued share capital of the Central Africa Railway Co., Ltd., which owns the line from Port Herald to Chindio on the north bank of the river. The Trans-Zambesia Railway Co., Ltd., was registered in 1919 to construct and work in the territory of, and under concession from, the Companhia de Moçambique 156 miles of railway from Murraca on the southern bank of the Zambesi River to Dondo on the Beira Junction Railway, 18 miles from Beira, the Company to have running rights over these 18 miles of Beira line with terminal and other facilities.

Under arrangements between the Nyasaland Government and these Companies, the Nyasaland Government is providing about £3,500,000 to enable the Nyasaland Railway Co., to construct the extension to Lake Nyasa of its existing line, and to finance construction of the bridge over the Zambesi by the Central Africa Railway Co., as well as the extension by the Trans-Zambesia Railway Co., of its existing line from Murraca to Sena to connect with the bridge and other improvements of its existing system.

The bridge which will span the river from Sena on the south to Mutarara on the north bank, will have a total length of 12,064 feet and is estimated to cost approximately £1,500,000 with the necessary railway approaches. It is expected to be open for traffic in 1935.

ROADS.

The internal communications of Nyasaland have been developed mainly through its road system which radiates from Blantyre and Limbe to serve the transport requirements of the territory beyond railhead. The natural soil conditions are in general favourable to earth road construction and, of a total of 3,325 miles of public roads, only 96 miles are metalled.

A main trunk road, passable all the year round, runs from Blantyre northwards and westwards passing through Zomba (42 miles), Liwonde (74 miles), Ncheu (122 miles), Dedza (169 miles), Lilongwe (228 miles), and Fort Manning (299 miles) near the Northern Rhodesia border from which it is 22 miles to Fort Jameson. From this main trunk branches run eastward and northward to ports on Lake Nyasa and the principal centres in the Northern Province. One branch runs from Liwonde to Fort Johnston (46 miles) while from Lilongwe the northern extension runs through Kasungu (84 miles), Mzimba (181 miles), Ekwendeni (252 miles), Livingstonia (316 miles), to Karonga (384 miles). From Lilongwe another road bears in an easterly direction and connects with the railhead of the Northern Extension of the Nyasaland Railways at Salima (72 miles) and Lake Nyasa (80 miles). A road was opened to traffic in 1933 which, branching off in a north-westerly direction from a point north of Mzimba and running roughly along the Northern Rhodesia border to Fort Hill, connects at Tunduma, near the Northern Rhodesia-Tanganyika border, with the Great North Road running from South Africa and the Rhodesias to Kenya, Uganda, and the Sudan.

Another road runs from Blantyre southwards and eastwards serving the Cholo (96 miles) and Mlanje (54 miles) Districts. From Cholo a seasonal road runs southwards to the Shire River at Chiromo (58 miles) and on to Port Herald (91 miles).

A road of increasing territorial importance is that which runs westwards from Blantyre through Mwanza (52 miles) to the Portuguese boundary (61 miles) whence turning southwards it leads to the Zambesi ferry at Tete (142 miles) and on to Salisbury in Southern Rhodesia (387 miles). The Governments concerned are co-operating to raise this road to an all-weather standard.

WATER TRANSPORT.

Prior to the opening of the Trans-Zambesia Railway in 1922, the main means of communication with the sea was by the Shire and Zambesi Rivers to Chinde, but since then river transport has declined and is now confined to a small traffic, mainly in sugar and salt, between Zambesi ports and Port Herald on the Shire. Water transport is now therefore mainly confined to Lake Nyasa, and this may be expected to be of increasing importance when the extension of the railway reaches the Lake.

At present the Nyasaland Government Marine Transport operate a monthly sailing of the S.S. *Guendolen* from Fort Johnston carrying goods and passengers to various ports on the Lake, the round trip taking 15 days. Calls are made at a number of small ports the principal being Domira Bay, Kota Kota, Nkata Bay, Florence Bay, Karonga and Mwaya, the last named being in Tanganyika Territory. There are also certain privately-owned vessels belonging to the Universities' Mission to Central Africa on the Lake.

AIR.

Air services are being increasingly used both for internal and external communication and several aerodromes have been established. A privately-owned Aviation Company operates in the Protectorate and planes can be hired, either for local flights or to connect with Imperial Airways Services. There is a regular bi-weekly mail and passenger service from Chillka (Blantyre) to Salisbury, Southern Rhodesia, connecting with Imperial Airways.

PORTS.

The Port of Beira is situated at the mouth of the Busi and Pungwe Rivers in the territory of Portuguese East Africa administered by the Companhia de Moçambique and is the main sea port serving the Rhodesias, Nyasaland, and the adjacent Portuguese territories. It is a port of call for all the steamship lines on the South and East African services and has a considerable transshipment trade brought in by coasting vessels from smaller ports. Loading and discharging are done partly by lighters but there have been extensive additions in recent years to the facilities of the port including the building of deep water berths with sheds and railway connexions. The number of vessels using the port in 1931 was 612 with a tonnage of 3,070,503, of which 309 vessels with a tonnage of 1,791,275 were British.

IX.—Tariff.

The Customs Tariff is established by the Customs Ordinance No. 8 of 1906.

(i) *Import duties.*—There are specific duties on certain goods and *ad valorem* on certain other goods varying from 10 per cent. and as much as 30 per cent. in the case of second-hand clothing and perfume and spirits.

All other goods except those specifically exempted from duty, pay an *ad valorem* duty of 17 per cent.

Certain goods are dutiable either at specific or *ad valorem* rates, depending upon which rate yields the higher duty.

(ii) *Road, River, and Wharfage Dues* at the rate of 3 per cent. *ad valorem* are also charged on goods imported with certain exceptions.

(iii) *Imperial Preference.*—Nyasaland is included in the Conventional Basin of the Congo, and in view of the international agreements relating thereto, it is not possible to adopt a policy of Imperial Preference.

X.—Trade Representatives, etc.

His Majesty's Eastern African Dependencies Trade and Information Office (Grand Buildings, Trafalgar Square, London, W.C.2) was established in London in 1925 to disseminate in the United Kingdom information regarding East Africa and to stimulate its trade by helping to introduce its products into the home market. The Office is under the control of a Commissioner, who is assisted by an Advisory Committee.

An Imperial Trade Commissioner, under the Department of Overseas Trade (address P.O. Box 839, Johannesburg), is maintained in South Africa and his sphere of responsibility includes Nyasaland as well as the Union of South Africa.

SOMALILAND.**I.—Situation, etc.**

The Protectorate of British Somaliland is situated on the south of the Gulf of Aden, on which it has a coast line extending about 450 miles. Italian Somaliland lies to the east and south-east, French Somaliland to the west, and Abyssinia, inland, to the south. The total area is some 68,000 square miles.

There are two main physical areas; the coastal plain, varying from 60 miles to half a mile in depth; and the interior plateau sloping gently south and east; between them is an escarpment, precipitous in the east, more gentle in the west, rising 5,000 to 7,000 feet. There are the remains of juniper* forests at some points on the escarpment but the interior is mainly covered by bush or grass. In parts of the Protectorate the *dusok* (boxus) tree grows to 16 feet high.

The coastal plain is hot and the rainfall there sparse. Inland, the escarpment catches the rain and the heat on the higher ground is at no time intolerable. Rainfall, while small, is fairly regular. There is practically none from December to March, and the heaviest rains fall in April and May. The rains are, however, very local and local conditions may accordingly vary greatly.

The following tables show the most significant meteorological data:—

Rainfall in inches.

	1929.	1930.	1931.	1932.	1933.
Berbera	0·37	4·63	1·43	2·20	0·86
Sheikh	25·04	27·02	19·43	18·79	17·07
Burao	9·25	6·50	9·79	5·58	5·58
Hargeisa	17·07	20·67	25·35	15·28	12·42
Zeilah	1·81	8·83	0·66	8·12	2·05
Borama	16·42	22·55	20·24	25·99	15·90
Erigavo	11·90	12·84	10·53	11·07	9·81

* Cedar (*Juniperus procera*).

Temperature, 1933.

	<i>Mean Maximum Fahr.</i>	<i>Mean Minimum Fahr.</i>	<i>Absolute Maximum Fahr.</i>	<i>Absolute Minimum Fahr.</i>
Berbera	92.9	78.5	111	65
Sheikh	79.1	53.5	92	34
Burao	86.6	62.5	98	49
Hargeisa	86.3	56.6	97	38
Zeilah	90.9	76.5	108	63
Borama	83.0	59.5	94	35
Erigavo	77.4	50.1	86	34

A water-boring party, financed by a grant from the Colonial Development Fund, has been testing various areas of the Protectorate for water. In 1931 an excellent supply of water was obtained near Sillil on the coastal plain, and a pumping plant, storage tanks, and troughs were installed. In 1932 drilling was conducted at various points in the plateau country, but without success.

All land, except in proclaimed townships, may be regarded as vested in the Somali tribes. Plots varying from one to fifteen acres are cultivated on a system analogous to that of peasant proprietorship, but tenure of the plots depends entirely on continued occupation and cultivation, and if this is neglected for more than one year the land becomes available for any other member of the tribe within whose area the land lies who is willing to work it. There is no European ownership or other interest in land.

Within the proclaimed townships Government has taken power to grant leases or temporary occupation licences to individuals.

II.—Population.

No complete census has been taken, but the Somali population is estimated at 344,700. A non-native census taken in April, 1931, showed a non-native population of 2,683 including 68 Europeans, 520 Indians, 1,614 Arabs, 100 Abyssinians, and 258 Nyasaland natives serving in the Camel Corps.

There are no large towns.

The native population is almost entirely nomadic, and periodic migration across the southern border into Abyssinia, in search of grazing, is customary amongst many tribes and sections.

III.—Finance.**A. CURRENCY AND BANKING.**

1. The unit of currency is the Indian rupee. Indian silver rupees, subsidiary rupee coinage, and notes are in circulation.

2. There are no banks in the Protectorate but Messrs. Cowasjee Dinshaw and Brothers conduct some banking business.

A Government Savings Bank exists and deposits are made by all classes of the community. At the 31st December, 1933, the number of depositors was 156 and the amount standing to their credit Rs.21,866.

B. PUBLIC FINANCE.**1. Public Debt.**

At 31st December, 1933, the public debt stood at £220,000 being owed entirely to the Imperial Exchequer in respect of past loans-in-aid for civil expenditure. No provision has been or is being made for payment of interest or repayment of capital in respect of the debt.

2. Revenue.

(A) *Analysis of Revenue (on basis of Estimates for the year 1934).*

Self-balancing Department.

	<i>Revenue. £</i>	<i>Expenditure. £</i>	<i>Deficit. £</i>
Posts and Telegraphs Department	1,170	8,254	7,084

General Revenue.

	<i>£</i>	<i>Percentage.</i>	<i>£</i>	<i>Percentage.</i>
1. Customs :—				
Import Duties	53,000	56.7		
Export Duties	11,000	11.7		
			64,000	68.4
2. Inland Revenue			17,600	18.8
3. Fees of Court and Office			8,850	9.5
4. Miscellaneous and other receipts			3,040	3.3
			93,490	100.0
Revenue of self-balancing Department set off against				
Expenditure			1,170	
Receipts from Colonial Development Fund			1,134	
			95,794	

(B) *Analysis of Import Duties, 1933.*

It is not possible to give accurate figures as to the amount of duty collected on goods imported from the United Kingdom, the rest of the Empire and foreign countries, but the following table shows so far as possible the amount of duty collected according to classes.

									£
Class I	...	...	...	...	...	...	...	...	36,984
Class III	...	...	...	...	...	...	...	...	8,726
									45,710
Unclassified miscellaneous goods	...	...	...	...	...	...	...	...	14,063
Goods in transit	...	...	...	...	...	...	...	...	395
									£60,168

3. *Analysis of Expenditure on the basis of the Estimates for the year 1934.*

	£	Percentage.
1. Deficit on self-balancing Department	7,084	4.6
2. Debt Charges	—	—
3. Administration	83,329	54.3
4. Economic Development	2,947	1.9
5. Social Services	10,169	6.6
6. Defence	42,573	27.7
7. Non-effective—Pensions and Gratuities	7,494	4.9
	153,596	100.0

Expenditure of self-balancing Department set off against Revenue	1,170
Expenditure from Colonial Development Fund	1,134
	£155,900

4. There is no reserve fund.

On the 31st December, 1933, the excess of assets over liabilities stood at £27,493 of which £24,028 was liquid.

5. Assistance from the United Kingdom Exchequer was received in respect of 1933 as follows:—

	£	£
Civil Loan-in-Aid	2,750	
Military Grant-in-Aid	29,000	
		31,750

Assistance in respect of 1934 is estimated as follows:—

	£	£
Civil Loan-in-Aid	16,000	
Military Grant-in-Aid	42,000	
		58,000

There is little or no prospect of the administration being in a position to dispense with assistance from the United Kingdom Exchequer.

The amount received during the five-year period 1929-1933 is as follows:—

	£	£
Civil Loans-in-Aid	86,000	
Military Grants-in-Aid	321,000	
		407,000

The following free grant has been received from the Colonial Development Fund:—

Water Boring	£21,500
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IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	British Empire.	Foreign countries.	Total.
	£	£	£
1913-14	214,751	9,998	224,749
1930	231,020	24,788	255,808*
1931	194,423	11,138	205,561*
1932	141,891	22,976	164,867*
1933	185,584	15,095	200,679*

(ii) *Domestic Exports by Classes, 1933.*

To:—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
British Empire	36,925	92,492	741	1,456	131,614
Foreign countries	12,369	468	488	1,019	14,364
TOTAL	49,314	92,960	1,229	2,475	145,978

Exports from Somaliland are generally consigned to Aden, mainly for reshipment. Details regarding the subsequent destinations of the goods are not available.

* Inclusive of exports in transit from Abyssinia amounting to:—£56,880 (1930), £48,161 (1931), £38,990 (1932), £47,032 (1933).

(iii) (a) *Principal Domestic Exports, 1933.*

Article.	Total Quantity.	Total Value. £	Principal places of destination.
Class I.			
Sheep	80,131	28,316	Aden.
Goats	40,058	9,228	Aden.
Ghee	1,643 cwt.	5,912	Aden.
Salt	54,083 „	2,053	Abyssinia.
Bullocks and Cows ...	1,086	1,419	Aden.
Class II.			
Skins (sheep and goat) untanned.	1,715,750	81,000	Aden for Europe.
Gums and Resins	8,467 cwt.	9,112	Aden for Europe and India.

(b) *Principal "In Transit" Exports, 1933.*

Class I.		
Coffee, raw	8,215 cwt.	23,144
Ghee	2,283 „	7,232
Class II.		
Skins (sheep and goat) untanned.	180,690 „	10,493
Gums and Resins	1,288 „	2,083

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom. £	Rest of Empire. £	Foreign countries. £	Total. £
1913-14	—	221,465	27,047	248,512
1930	52,160	249,808	69,534	371,502*
1931	49,471	171,725	90,247	311,443*
1932	52,361	155,569	98,704	306,634*
1933	67,824	169,964	96,042	323,830*

(ii) *Imports by Classes, 1933.*

From:—	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	46,737	—	21,087	—	67,824
Other parts of British Empire (via Aden).	124,269	2,874	15,169	7,655	149,967
Total Empire	171,006	2,874	36,256	7,655	217,791
Foreign countries (via Aden) ...	19,306	811	40,835	5,407	66,359
GRAND TOTAL	190,312	3,685	77,091	13,062	284,150

In addition there were imports of bullion and specie to the value of £158.

Imports into Somaliland are generally consigned from Aden.

Details regarding the countries of origin of the goods are not available.

(iii) (a) *Principal Imports, 1933.*

Article.	Total Quantity.	Total Value. £	Principal countries of origin with amounts in £'000.
Class I.			
Grain, flour, etc.—			
Rice	160,215 cwt.	87,929	India (all).
Millet	5,440 „	2,966	India (all).
Flour	5,208 „	3,884	India (all).
Other kinds	11,960 „	8,193	India (all).
	182,823 „	102,972	
Sugar	3,102 tons	45,333	United Kingdom (45).
Dates	43,125 cwt.	16,288	Persian Gulf (all).
Tea	168,169 lb.	12,637	India (all).
Class III.			
Cotton manufactures—			
Piece Goods—			
White Long Cloth ...	661,298 yd.	17,238	United Kingdom (16), Japan (1).
Grey Sheetting ...	701,463 „	11,968	Japan (11).
Other kinds	649,803 „	18,277	
Yarn	—	447	
		47,930	
Oil—			
Motor Spirit	105,292 gal.	11,883	Egypt (6), United States of America (5).
Kerosene	47,378 „	2,332	Egypt (1), United States of America (1).
	152,670 „	14,215	

*Inclusive of imports in transit to Abyssinia amounting to:—£81,004 (1930), £45,003 (1931), £41,810 (1932) £39,522 (1933).

(b) Principal "In Transit" Imports, 1933.

Article.				Total Quantity.	Total Value. £	Principal countries of origin with amounts in £,000s.
Class I.						
Sugar	...	...	...	463 tons	4,216	
Rice	...	...	...	1,085 cwt.	482	
Dates	...	...	...	428 "	149	
Class III.						
Cotton Manufactures—						
Piece Goods—						
White Long Cloth	...			378,508 yd.	5,642	Japan (5).
Grey Sheeting	...			1,358,800 "	14,865	Japan (11), China (3).
				1,737,308 "	20,507	

V.—Natural Resources.

The Somalis generally lead a pastoral, nomadic life. Settled cultivation is rare and production generally is very loosely organized.

The country is primarily camel country owing to the scantiness of the water supply, but cattle thrive, especially in the hills, and sheep and goats also do excellently as long as the rainfall is up to the average.

A.

1. AGRICULTURE.

Formerly such crops as were grown were produced under a system of shifting cultivation. This practice shows signs of disappearing but there is still comparatively little permanent agriculture. Such as there is is concentrated mainly in a strip of country 80 miles long and from 2 to 15 miles wide in the western half of the Protectorate, which has the comparatively generous average rainfall of 17 inches per annum. Recently it has been extending in parts of the central plateau area under a crude native irrigation system which may be capable of development. At present the total area under cultivation is estimated at 80,000 acres. About 8,000 men are working on the land, most of them supporting a family, but a reliable estimate of the number will not be available until a survey now in progress is completed. The establishment of a system of permanent agriculture is giving rise to problems of soil-exhaustion and crop-rotation which are engaging the attention of Government.

The crops now being produced are principally sorghum, maize, gram, and barley. The whole of the crop is consumed locally, the surplus not required by the producers being sold in the open market. No estimates of the areas cultivated under each crop and the amounts produced are available. About 350 tons of sorghum were sold in the Hargeisa market in 1933. The Government has made efforts, with some success, to introduce new varieties of sorghum and maize.

2. FORESTS.

There are areas of juniper* forest on the escarpment, but no important trade in timber, although small quantities of damask (*conocarpus*) timber are produced in the Erigavo valleys for sale to dhows, etc.

Gum Arabic and other gums and gum-resins, of which frankincense is the most important, provide the only significant domestic exports other than animals and animal products.

Frankincense is a brownish or yellowish sweet-smelling "gum" or, more accurately, a gum-resin, which, under certain conditions, exudes from the trunk and larger branches of species of the trees "*Boswellia*". While it is found in various parts of the Red Sea coast, it has been known in and collected from Somaliland since the days of the Roman Empire. Indeed Somaliland was known to the Romans as the *Regio Aromatifera*, or *Thurifera*.

The tree grows chiefly on those arid rocky ridges adjoining the coast which reach a maximum altitude of about 2,500 feet. It is usually found not, like a normal tree, with its roots in the soil, but clamped to the open rock surface by a round somewhat thickened sucker from which small roots may emerge. In the Protectorate, the trees are chiefly confined to the coastal portion of the Erigavo District, and are commonest in two localities, one of which is within thirty or forty miles of the Italian Somaliland boundary. They are grouped in "plantations", the term "plantation" signifying not a planted area, but an area of naturally-growing trees that is owned by a particular native family or tribal-section. Ownership implies no title to the land itself but only the right to collect the "gum" from the area. Each "plantation" has been held by the same family or section for generations and is regularly handed down from father to son.

When the season for tapping and collecting the "gum" has arrived, the owner of a "plantation" arranges for a certain number of natives to do the work for him. The method of tapping and collecting generally employed is primitive. The trunk and larger branches of the tree are bruised in a few small patches by means either of the head of a native tomahawk or of a stone. After some weeks a small ball of "gum" forms on the bruise and gradually hardens on exposure to the sun. These balls are picked off, put into baskets and taken to the coast for disposal by the owner of the trees. Much of the gum obtained in this manner contains avoidable impurities, bark, sand, etc., and the process of grading applied to all of it has for long been rough and ready.

About four years ago, the Protectorate Government, with a view to improving the local market value of the product, arranged for two Somalis already familiar with the trees and with the time-honoured local practices in regard to them, to be sent to the Sudan for training in the correct methods of tapping, collecting and grading gums. On their return, these men were appointed inspectors of plantations to demonstrate to the owners and labourers the improved methods they had themselves learned, and the results of their efforts are now beginning to be seen in the improved quality of "gum" offered for sale.

* Cedar (*Juniperus procera*).

At the coastal ports, the frankincense is disposed of in one of two ways. The aggregated lots belonging to several owners may be handed over to an Akil (a Government-appointed head-man of a tribe or section) to be taken directly to Aden by dhow and sold there; or, alternatively, each individual lot may be sold at the coastal port to Arabian agents of gum-buying firms whose headquarters are in Aden.

All "gums" from the Protectorate are and will continue to be sold in Aden, and the quantity annually disposed of is probably at least equal to that produced from Southern Arabia. When sold, part goes to Europe, part to Egypt, and part to India and the Far East. The inferior qualities are said to be marketed in Abyssinia.

The buying and selling arrangements in Aden are in the hands of European, Indian and Arab merchants. Prices are subject to considerable fluctuations, and it is possible that, as the cost of living from the Somali point of view is high in that port, representatives who bring the gums from the Protectorate, may for that reason be obliged sometimes to accept a price below the best obtainable. In point of fact, the Protectorate Government is anxious to get an agency established at one or more of the Customs ports by a reputable merchant or firm interested in the gum trade. This should improve local trading conditions and help in stabilizing prices for the "gum" owners.

The trade returns do not distinguish between the different varieties of gum and gum-resin, and until 1933 the recorded exports included an unknown quantity of gums and gum-resins imported from Abyssinia and re-exported.

Total exports (in 1933 domestic exports only) during recent years have been:—

		cwt.	£			cwt.	£
1929 ...	...	16,759	18,226	1932 ...	...	16,669	10,489
1930 ...	...	13,261	20,258	1933 ...	...	8,467	9,112
1931 ...	...	11,880	13,726				

Arrangements have been made to test the commercial possibilities of the nut of the Ye'eb tree (*Cordeauxia edulis*) which grows in the south-eastern part of the Protectorate. The nut resembles the almond and is said to be very nutritious.

3. ANIMAL HUSBANDRY.

As already indicated, the foundation of the economic life of the Protectorate is pastoral and the principal exports are live animals and animal products. Practically the whole of the land not under cultivation is grazed over, although there are certain more definitely recognized pastoral plains, whose area is being estimated. The numbers of animals in the Protectorate are estimated as follows:—

Sheep ...	...	2,500,000	Horned cattle ...	30,000
Goats ...	...	2,000,000	Horses, donkeys, and	
Camels ...	...	1,500,000	mules ...	3,000

While these flocks are chiefly important as providing food-stuffs (chiefly mutton, goat's flesh, and goat's milk with some beef and cow's milk) for local use, they are also the principal source of the Protectorate's exports.

Live animals are exported both by sea (chiefly to Aden, but small quantities to Suez and Mukalla) and over the land-frontier to Abyssinia, but hides and skins and ghee are exported only by sea the former to Europe and America via Aden, the latter to Aden for local consumption.

The following table shows the exports of live animals (the number of animals exported over the land-frontier being shown separately as well as in the total) and animal products during recent years:—

				Cattle and bullocks.			Sheep and goats.		
				By land.	By land and sea.	£	By land.	By land and sea.	£
				No.	No.		No.	No.	
1929 ...	...	...	...	554	563	1,707	6,341	60,079	55,246
1930 ...	...	...	...	1,807	2,102	6,665	9,853	76,127	64,231
1931 ...	...	...	...	467	857	2,237	17,914	104,682	56,882
1932 ...	...	...	...	275	756	1,580	20,737	136,497	50,167
1933 ...	...	...	...	569	1,086	1,419	20,600	120,189	37,544

				Hides.		Skins.		Ghee.	
				No.	£	No.	£	cwt.	£
1929 ...	...	...	...	2,832	10,194	981,428	110,421	1,059	4,950
1930 ...	...	...	...	71	241	810,131	92,336	5,745	24,597
1931 ...	...	...	...	37	78	997,221	72,142	7,247	26,381
1932 ...	...	...	...	—	—	1,079,796	46,889	5,913	20,321
1933 ...	...	...	...	—	—	1,715,750	81,000	1,643	5,912

The exports of animals by land include only those which pass through the Land Customs Station at Zeilah, and do not include all exports over the land-frontier. In addition to the animals mentioned between 10 and 20 horses, between 100 and 300 camels, and one or two donkeys pass out through Zeilah annually.

A system of Government certification of the Empire origin of locally-produced skins has recently been introduced.

A small Veterinary Department is maintained, which looks after the animals of the Somaliland Camel Corps and takes such action as is possible to combat diseases. The most important of these are pleuro-pneumonia contagiosa (now almost eradicated), rinderpest, arthritis, surra in camels, and trypanosomiasis.

4. MINERAL WEALTH.

Petroleum, galena, mica, and coal are known to occur in the Protectorate, but none of these are worked. *Gold* has been found in gum residues from the Erigavo district, and the presence of gold and, in one instance, platinum has been determined by assay in samples from the northern foothills of the same district, but there is so far no evidence that these minerals occur in commercial quantities. Geological investigation at present proceeding is mainly directed to the discovery of underground water supplies.

5. FISHERIES.

There is an abundance of fish in Somaliland waters, but owing to the lack of enterprise of the local fisherman these resources are practically unexploited and the local supply of fish vended in the towns is considerably less than the actual demand.

It is estimated that about 300 Arabs and Somalis engage in fishing, mostly with hand-lines from canoes. There does not appear to be any prospect of developing an export industry.

A few natives are engaged in the mother-of-pearl and trocas shell fisheries; their operations formerly extended to the waters of French and Italian Somaliland, but they are now excluded from these waters and find it hard to collect sufficient shell in the restricted area available. Although occasional finds of valuable pearls are possible, it is from the sale of the empty shells that the divers derive their maintenance.

Exports of shell during recent years have been as follows:—

		cwt.	£			cwt.	£
1929	...	376	741	1932	...	557	786
1930	...	499	963	1933	...	480	881
1931	...	229	399				

6. MISCELLANEOUS.

Salt is worked in the Zeilah district, where there are about 200 holders of some 1,900 salt pans, capable of producing 10,000 tons of salt *per annum*.

There were formerly substantial exports of salt by sea to neighbouring territories, particularly French Somaliland, but this trade almost disappeared in 1931. In 1932, however, exports over the land frontier increased by over 37,000 cwt. Exports during recent years have been as follows:—

		cwt.	£			cwt.	£
1929	...	61,998	2,330	1932	...	40,064	1,525
1930	...	20,638	780	1933	...	54,083	2,053
1931	...	2,307	86				

B.

FOOD SUPPLY.

The Somalis are self-supporting as regards many principal food-stuffs, e.g., meat and dairy produce, but considerable quantities of rice (from India), dates (from the Persian Gulf), and sugar are imported. Particulars of these and other food-stuffs imported during the years 1929-1933 are as follows:—

<i>Flour.</i>				<i>Millet.</i>				<i>Rice.</i>			
			<i>Value</i>				<i>Value</i>				<i>Value</i>
			<i>£</i>				<i>£</i>				<i>£</i>
<i>cwt.</i>				<i>cwt.</i>				<i>cwt.</i>			
1929	...	...	5,573	5,573	24,874	18,408	183,686	188,941			
1930	...	...	4,560	4,427	4,122	2,894	127,944	88,739			
1931	...	...	5,220	4,575	4,893	3,359	112,034	76,569			
1932	...	...	5,084	4,362	4,714	3,039	100,182	72,668			
1933	...	...	5,208	3,884	5,440	2,966	160,215	87,929			

<i>Other grains.</i>				<i>Dates.</i>				<i>Sugar.</i>			
			<i>Value</i>				<i>Value</i>				<i>Value</i>
			<i>£</i>				<i>£</i>				<i>£</i>
<i>cwt.</i>				<i>cwt.</i>				<i>cwt.</i>			
1929	...	...	13,353	9,947	51,395	35,500	45,823	45,887			
1930	...	...	19,650	12,726	45,445	28,175	21,127	37,002			
1931	...	...	9,656	6,956	65,276	31,821	50,334	38,805			
1932	...	...	44,019	7,857	81,588	29,393	54,267	37,048			
1933	...	...	11,960	8,193	43,125	16,288	62,044	45,333			

VI.—Industry.

There are no industrial establishments in the Protectorate.

VII.—Other Economic Activities.

The ports of Somaliland conduct some trade on behalf of the neighbouring parts of Abyssinia.

In the five-year period 1929-33 merchandise passed through Protectorate ports in transit to or from Abyssinia to the value of:—

	£
1929	80,915
1930	117,884
1931	93,165
1932	80,801
1933	86,554

The revenue from this trade is between £800 and £900 annually.

There is no tourist traffic or other important "invisible export". The apparent excess of imports over "visible" exports in recent years is largely accounted for by the grants-in-aid received from the United Kingdom Exchequer.

VIII.—Communications.

Internal Communications.—There are no railways or waterways, but there are 950 miles of motorable roads and tracks. In addition to motors privately owned (29 passenger vehicles and 44 commercial vehicles licensed in 1933), the Government motor services, maintained mainly for Government use, are available for private use as well.

External Communications.—There is fairly considerable traffic chiefly by dhow along the coast of Somaliland and contiguous territories and across to Aden and Southern Arabia, but the Protectorate's trade is carried principally on the weekly steamship service between Berbera and Aden operated under contract by Messrs. Cowasjee Dinshaw & Brothers. This service connects at Aden with the outward and homeward services of the Peninsular and Oriental Steamship Co., and other vessels calling at that port.

There are five ports of entry in the Colony :—Berbera, Zeilah, Heis, Las Khorah, and Elayu, but steamers enter only at Berbera and Zeilah.

The following table shows the total amount of shipping which entered at all ports of the Protectorate in 1933 :—

Country of Registration.	Sailing vessels.		Steamers.	
	No.	Net tons.	No.	Net tons.
British	195	5,496	99	37,356
Arabia	329	8,757	—	—
Italy	34	909	—	—
France	26	155	3	2,986
Norway	—	—	1	2,647
	584	15,317	103	42,989

Berbera lies at the head of a small bay in which there is ample anchorage in 5 to 10 fathoms. All loading and unloading is by small craft. There are two small piers which are high and dry at low water.

At Zeilah all loading and unloading is by small craft on to the open beach.

IX.—Tariff.

Import duties are levied on all imports except a few specifically exempted. Specific rates are charged on alcoholic liquors, rice, sugar, dates, matches, and some textiles. All other non-exempted imports are charged at *ad valorem* rates of 15 per cent. preferential and 25 per cent. general with a few exceptions, on which the rates are 10 per cent. and 20 per cent. respectively.

Preferential rates on goods of Empire origin are provided in the case of all dutiable goods ; as indicated above the margin of preference is generally 10 per cent. *ad valorem*.

Goods imported in transit to or from Abyssinia are subject to a uniform duty of 1 per cent. *ad valorem* only.

X.—Trade Representatives, etc.

Somaliland has no trade representative abroad, and there are no overseas trade representatives in the Protectorate. His Majesty's Eastern African Dependencies Trade and Information Office provides inquirers in this country with such information as is available.

ZANZIBAR.

I.—Situation, etc.

The Zanzibar Protectorate comprises the islands of Zanzibar and Pemba and the islets within their territorial waters. A strip on the coast of Kenya measuring 52 miles in length and 10 miles in width, which includes the island of Mombasa, is also part of the dominions of the Sultan of Zanzibar. A portion of the coastal strip has been leased to Italy at a rental of £1,000 per annum, and the remainder to the Kenya Government at a rental of £10,000 per annum.

Zanzibar, the largest coralline island off the East African Coast, is situated in latitude 6° S. and longitude 39° E. and separated from the mainland by a channel 22½ miles across at its narrowest part. It is about 53 miles long by 24 miles broad (maximum measurements) with an area of 640 square miles (roughly the size of Hertfordshire).

Pemba lies about 25 miles to the north-east of Zanzibar and is 42 miles long by 14 miles broad (maximum measurements) with an area of 380 square miles.

Both islands are low-lying and the highest point (Masingini Ridge) is only 440 feet above the sea-level.

Zanzibar town is distant 135 miles from Mombasa, 43 from Dar-es-Salaam, 78 from Tanga, 1,607 from Durban and 6,623 from London.

The climate is hot and, during periods, humid but, though enervating, it is not unhealthy for Europeans. The seasons are well defined. From December to March when the north-east monsoon blows it is hot and comparatively dry. In April and May occur the heavy rains (*masika*). May to October is the coolest and driest period (south-west monsoon). The lesser rains fall in November and December.

The mean maximum temperature in Zanzibar Town is 84.4° F. and the mean minimum 76.6° F. The normal rainfall is about 58½ inches. The mean maximum temperature in Pemba is 86.3 and the mean minimum 76.1. The normal rainfall is about 73½ inches.

The British East African Meteorological Service has established a first-class station at Chukwani seven miles south of Zanzibar Town.

All land, save certain small areas which are held by indigenous tribes in communal ownership, is the property of the Government or of private persons. There is no system of alienation by Government to settlers.

II.—Population.

The population recorded at the 1931 census was:—

	Zanzibar.	Pemba.	Total.
Africans	113,148	73,318	186,466
Arabs	11,478	21,923	33,401
British Indians	11,954	2,288	14,242
Europeans	243	35	278
Others	916	125	1,041
	<u>137,739</u>	<u>97,689</u>	<u>235,428</u>

The only town of importance is Zanzibar Town, which had a population of 45,276, including 222 of the Europeans and 10,926 of the British Indians. The Indians, originating mostly from Cutch, are the principal merchants, shopkeepers, moneylenders, and artisans. The natives and Arabs are predominantly occupied in agriculture and are the chief landowning classes. The African population is of Swahili origin and comprises representatives of many mainland tribes as well as aboriginal tribes of Zanzibar.

The principal occupations in 1931 were as follows:—

Total adult male population	87,677
Peasant cultivators	35,849
Plantation proprietors	6,161
" labourers	6,308
Fishermen	4,594
Shopkeepers	5,013

The estimated total population as on the 31st of December, 1933, was:—

Zanzibar	137,906
Pemba	99,468
Total	<u>237,374</u>

There is no important emigration or immigration to or from India and the mainland.

III.—Finance.

A.—CURRENCY AND BANKING.

The silver rupee of British India (= 1s. 6d.) is the standard coin of the Protectorate, and is unlimited legal tender. The other silver coins of British India and local copper pice, at the rate of 64 pice to one rupee, form the subsidiary coinage.

Notes issued by the Zanzibar Government of the following denominations

Rupees 1, 5, 10, 20, 50, 100, and 500

are also unlimited legal tender. It has recently been decided to substitute for the currency at present in circulation the coin and notes issued by the East African Currency Board, and it is hoped to begin the change on 1st January, 1936.

Two British Banks maintain branches in the territory:—

The National Bank of India Limited	} Both at Zanzibar.
The Standard Bank of South Africa Limited	

There are also two private Indian banking firms:—

Messrs. Jetha Lila.

Mr. Saleh Gangji.

There are no agricultural or co-operative banks, but the Protectorate Government has assisted in the finance of the clove industry by granting loans to members of the Clove Growers' Association on the security of chattel mortgages and of produce deposited for storage.

There is a Government Savings Bank with 4,083 depositors at the end of 1933 and total deposits of Rs.701,237.

B.—PUBLIC FINANCE.

1. Public Debt.

Zanzibar has no public debt.

2. Revenue.

A. Analysis of Revenue (on the basis of Estimates for 1934).

Self-balancing Departments.

	Revenue. Rs.	Expenditure. Rs.	Balance. Rs.
Post Office and Savings Bank ...	116,000	79,461	+ 36,539
Electricity, Telephones and Wireless	368,525	298,168	+ 70,357
	<u>484,525</u>	<u>377,629</u>	<u>+ 106,896</u>

Surplus Rs.106,896.

General Revenue (excluding Colonial Development Fund).

	Rs.	Rs.	Per cent.
I. Customs, i.e.—			
Export Duties	1,235,000		
Import Duties	1,830,000		
		3,065,000	55.1
II. Licences and Internal Revenue ...		370,530	6.7
III. Fees of Court, etc.		1,093,220	19.7
IV. Miscellaneous revenue		923,206	16.6
V. Surplus on Self-balancing Departments		106,896	1.9
	Equivalent to £419,809 ...	5,597,452	100
Revenue of self-balancing Departments set off against Expenditure		377,629	
Total ...		5,935,081	

B. Analysis of Customs Revenue.

Figures are not available to show the division of the revenue from import duties between the various classes of imports.

3. Analysis of Expenditure (on basis of 1934 Estimates).

							Rs.	Per cent.
I. Deficit on Self-balancing Departments	...	...	...	...	...	...	—	—
II. Debt Charges	...	...	...	...	...	...	—	—
III. Administration	...	...	...	...	...	...	2,738,108	49·7
IV. Economic Development	...	...	...	...	...	...	664,771	12·1
V. Social Services	...	...	...	...	...	...	1,433,268	26·0
VI. Defence	...	...	...	...	...	...	—	—
VII. Pensions and Gratuities	...	...	...	...	...	...	672,705	12·2
							Equivalent to £413,164	...
							5,508,852	100
Expenditure of self-balancing Departments set off against Revenue							377,629	
							Total	...
							5,886,481	

4. At the 31st of December, 1933, the Zanzibar Government had an excess of assets over liabilities of Rs.3,227,912 and held the following liquid assets:—

Investments on account of surplus Funds, Rs.1,629,109.

A loan of £200,000 to H.M. Government, the interest on which is payable by the Kenya Government is not included in the above figures.

5. No grants-in-aid have been received, with the exception of grants from the Colonial Development Fund of Rs.50,700 for anti-malarial work, Rs.106,667 for a high-pressure water-supply and Rs.100,000 for a shed for the Clove Growers' Association and a Copra inspection shed. The last three items are in hand.

IV.—Trade Statistics.**EXPORTS.***(i) Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	108,910	293,095	646,861	1,048,866
	Rs.	Rs.	Rs.	Rs.
1930	1,218,406	9,065,189	9,321,550	19,740,568*
1931	927,635	5,220,212	9,681,616	16,036,266*
1932	821,308	4,520,621	6,651,446	12,097,914*
Equivalent to ...	£61,598	£339,047	£498,858	£907,354*
1933	994,374	4,293,187	6,032,779	11,409,794*
Equivalent to ...	£74,578	£321,989	£452,458	£855,734*

* Inclusive of exports by Parcels Post (not shown in the preceding columns) but exclusive of those for Ships' Stores, the value of which was as follows:—

	Parcels Post.	Ships' Stores.
	Rs.	Rs.
1930	135,423	69,813
1931	206,803	56,672
1932	104,539	38,974
1933	89,454	72,303
Equivalent to ...	£6,709	£5,423

(ii) *Domestic Exports by Classes, 1933.*

To	Class I.		Class II.		Class III.		Class IV.		Total
	Rs.		Rs.		Rs.		Rs.		Merchandise.
United Kingdom ...	...	856,954	...	5,269	...	20,088	...	30	882,341
India and Burma ...	...	2,177,886	...	17,725	...	407	...	—	2,196,018
Straits Settlements ...	...	84,002	...	—	...	—	...	—	84,002
Rest of Empire ...	...	212,205	...	24,002	...	19,284	...	—	255,491
<i>Total Empire</i> ...	...	3,331,047	...	46,996	...	39,779	...	30	3,417,852
Dutch East Indies ...	...	2,172,927	...	—	...	—	...	—	2,172,927
United States of America...	...	920,968	...	—	...	325	...	—	921,293
Italy ...	...	37,227	...	855,210	...	—	...	—	892,437
France ...	...	—	...	556,488	...	—	...	—	556,488
Germany ...	...	201,127	...	14,761	...	—	...	—	215,888
Other foreign countries ...	...	305,106	...	24,112	...	3,449	...	—	332,667
<i>Total foreign countries</i> ...	...	3,637,355	...	1,450,571	...	3,774	...	—	5,091,700
Ships' Stores ...	...	17,492	...	11,001	...	—	...	—	28,493
GRAND TOTAL ...	Rs.	6,985,894	...	1,508,568	...	43,553	...	30	8,538,045
Equivalent to ...	...	£523,942	...	£113,143	...	£3,266	...	£2	£640,353

(iii) *Principal Domestic Exports, 1933.*

Article.	Total Quantity.	Total Value.	Principal countries of destination
		Rs.	with values in Rs. '000.
<i>Class I—</i>			
Cloves and Clove Products—			
Cloves ...	215,325 cwt.	6,616,871	India (2,172), Dutch East Indies (2,146), United States of America (921), United Kingdom (771), Straits Settlements (79), Egypt (66), Germany (63).
Mother of cloves ...	588 cwt.	2,667	China (2).
Clove stems ...	53,606 cwt.	264,286	Germany (138), United Kingdom (85), Dutch East Indies (27).
	269,519 cwt.	6,883,824	
Beche-de-Mer ...	968 cwt.	51,145	China (all).
<i>Class II—</i>			
Copra ...	12,244 tons	1,403,611	Italy (845), France (547).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913 ...	157,119	565,329	380,899	1,103,347
	Rs.	Rs.	Rs.	Rs.
1930 ...	3,432,673	7,963,099	7,599,935	19,393,164*
1931 ...	2,722,041	7,073,724	5,448,740	15,558,055*
1932 ...	2,703,063	5,165,563	4,444,380	12,597,518*
Equivalent to...	£202,730	£387,417	£333,328	£945,114*
1933 ...	1,542,570	5,080,723	4,361,201	11,215,894*
Equivalent to...	£115,693	£381,054	£327,090	£841,192*

(ii) *Imports by Classes, 1933.*

From	Class I.		Class II.		Class III.		Class IV.		Total
	Rs.		Rs.		Rs.		Rs.		Merchandise.
United Kingdom ...	...	321,387	...	29,525	...	1,081,394	...	—	1,432,306
India and Burma ...	...	2,402,665	...	18,023	...	499,542	...	915	2,921,145
Tanganyika Territory ...	...	309,993	...	663,621	...	12,640	...	4	986,258
Kenya ...	...	227,744	...	56,255	...	102,063	...	200	386,262
Australia ...	...	263,916	...	—	...	327	...	—	264,243
Rest of Empire ...	...	141,298	...	52,691	...	23,674	...	—	217,663
<i>Total Empire</i> ...	...	3,667,003	...	820,115	...	1,719,640	...	1,119	6,207,877

* Inclusive of Parcels Post (not shewn in the preceding columns) the value of which was as follows:—

	Rs.		Rs.
1930 ...	397,457	1932 ...	294,512
1931 ...	313,550	1933 ...	231,400
		Equivalent to ...	£17,355

(ii) Imports by Classes, 1933—continued.

From	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	Rs.	Rs.	Rs.	Rs.	Rs.
Japan	1,955	2,421	1,132,020	—	1,136,396
Netherlands East Indies ...	532,578	897	263,125	—	796,600
Holland	265,244	297	273,375	—	538,916
Italian Somaliland...	260,240	59,707	2,498	655	323,100
Persia	18,088	86	247,968	—	266,142
United States of America...	2,750	—	207,585	—	210,335
Portuguese East Africa ...	87,948	75,579	—	—	163,527
Germany	7,300	142	143,525	—	150,967
Arabia	58,522	1,724	90,612	—	148,858
China	9,719	—	92,643	—	102,362
Other foreign countries ...	227,852	78,485	212,889	—	519,226
<i>Total foreign countries</i> ...	1,470,196	219,338	2,666,240	655	4,356,429
Parcel Post	—	—	—	231,400	231,400
GRAND TOTAL	5,137,199	1,039,453	4,385,880	233,174	10,795,706
Equivalent to	£385,290	£77,959	£328,941	£17,488	£809,678

In addition there were imports of bullion and specie to the value of Rs.420,188 equivalent to £31,514; from the United Kingdom Rs.110,264, from the rest of the Empire Rs.305,152, and from foreign countries Rs.4,772.

(iii) Principal Imports, 1933.

(Excluding articles mainly imported for re-export.)

Article.	Total. Quantity.	Total Value. Rs.	Principal countries of origin with amounts in Rs. '000.
<i>Class I.</i>			
Grain, flour, pulse, etc. —			
Rice	387,138 cwt.	1,964,370	Burma (1,848), India (106).
Flour (all kinds)	56,807 „	380,491	Australia (262), India (116).
Millet	53,322 „	157,552	Tanganyika Territory (142).
Pulses	29,799 „	127,572	Portuguese East Africa (59), Tanganyika Territory (34).
Wheat	5,981 „	42,141	India (42).
Gram (all kinds)	7,050 „	35,420	Kenya (20).
Dhall	4,537 „	32,428	India (all).
Maize	11,084 „	27,631	Tanganyika Territory (18).
	555,718 „	2,767,605	
Sugar	43,828 tons	519,976	Netherlands East Indies (470).
Tobacco—			
Manufactured	85,278 lb.	170,737	Holland (165).
Cigarettes	84,318 „	164,021	United Kingdom (159).
Other Kinds	75,260 „	10,812	Tanganyika Territory (8).
	244,856 „	345,570	
Butter and substitutes—			
Butter	211 cwt.	21,870	India (10), Kenya (9).
Ghee (all kinds)	5,429 „	233,482	India (82), Tanganyika Territory (44), Holland (28), Socotra (27).
	5,640 „	255,352	
Animals and birds, living, for food—			
Cattle	2,370	113,508	Italian Somaliland (93), Kenya (15), Tanganyika Territory (4).
Goats	7,417	74,130	Italian Somaliland (59), Kenya (13).
Other kinds	—	21,903	Italian Somaliland (11), Kenya (10).
		209,541	
Tea	250,449 lb.	117,439	Netherlands East Indies (52), Kenya (40), Ceylon (20).
Fresh Vegetables—			
Onions	15,610 cwt.	68,803	India (39), Egypt (29).
Potatoes	6,108 „	21,833	Kenya (21).
Other Kinds	1,695 „	15,751	Egypt (5), Kenya (4).
	23,413 „	106,387	
Milk, preserved or condensed	4,208 „	92,717	Holland (56), Italy (12).
<i>Class II.</i>			
Sesame (<i>simsim</i>)	663 tons	90,678	Tanganyika Territory (73).

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. Rs.</i>	<i>Principal countries of origin with amounts in Rs. '000.</i>
Class III.			
Cotton Manufactures—			
Piece Goods—			
Printed, Khangas ...	1,676,042 yd.	515,880	United Kingdom (270), Holland (244).
Bleached ...	1,188,762 „	176,582	Japan (131), United Kingdom (32).
Dyed in the piece ...	788,141 „	169,505	Japan (88), United Kingdom (47).
Grey unbleached ...	1,067,248 „	150,343	Japan (87), India (52).
Other kinds ...	609,828 „	104,308	Japan (63), India (25).
Other Manufactures ...	—	126,419	India (32), United Kingdom (30), Arabia (26).
		1,243,037	
Oils—			
Petroleum and luminants...	685,485 gal.	372,677	Persia (194), United States of America (79), Netherlands East Indies (69).
Motor Spirit ...	258,194 „	270,977	Netherlands East Indies (171).
Other kinds ...	178,071 „	71,371	United Kingdom (35), Netherlands East Indies (22).
	1,121,750 „	715,025	
Apparel ...	—	312,916	Japan (176).
Silk and Artificial Silk Manufactures—			
Silk Manufactures ...	—	203,187	Japan (162), China (38).
Artificial Silk ...	440,574 yd.	105,623	Japan (102).
		308,810	
Straw Manufactures ...	890,436 No.	167,170	Kenya (87), Arabia (57).
Paper Manufactures (all kinds)	7,336 cwt.	146,744	United Kingdom (73), Austria (20).
Motor-cars, etc., and parts—			
Motor-cars and lorries ...	34	47,526	United Kingdom (33), Canada (12).
Motor-car parts (including tyres and tubes, etc.)	—	87,574	Japan (46), United Kingdom (21).
		135,100	
Iron and Steel Manufactures	365 tons	99,697	United Kingdom (59), Belgium (23).
Cement ...	3,101 „	92,491	Japan (70).

V.—Natural Resources.**A.****1. AGRICULTURE.**

The agricultural produce of Zanzibar for export purposes consists almost entirely of cloves and coconuts, the cultivation of which is in the hands of Arabs, Africans, and, in a lesser degree, Indians. The larger plantations are owned by Arabs or Indians, the smaller by Africans. There are no European producers but the Zanzibar Government owns numerous plantations of cloves and coconuts, carrying approximately 96,000 clove trees and 220,000 coconut palms, which are operated by the Agricultural Department, with a European manager in charge.

Cloves.—Zanzibar produces about 83 per cent. of the world's supply of cloves. It is calculated that there are 32,000 plantations carrying approximately 3½ million clove trees, occupying approximately 16,000 acres in Zanzibar and 32,000 acres in Pemba Island. All cloves are exported, the figures for the last 5 years being as follows:—

	<i>Cwt.</i>	<i>Rs.</i>		<i>Cwt.</i>	<i>Rs.</i>
1929 ...	174,778	11,569,866	1932 ...	162,054	6,498,598
1930 ...	145,831	9,756,600	1933 ...	215,325	6,616,871
1931 ...	216,738	9,783,967			

The clove duty-paid price during 1933 varied from Rs.6 to Rs.9 per *frasila* of 35 lb.

Recent legislative measures regarding the industry include the establishment of a grading system and the licensing of exporters. The former is a first attempt to grade clove spice to consumers' needs, and the latter is designed to ensure that the exporting is in the hands of responsible interests. An Adulteration of Produce Decree provides, *inter alia*, for a minimum standard of clove produce.

The Clove Growers' Association has now been established on a legal basis, and operates as a financing and marketing organisation for clove growers. The operating expenditure of the Association is recoverable by a levy on all cloves exported from the Protectorate.

The export of clove stems, excepting under licence, has been prohibited as from the 1st July, 1935, with the object of preventing the use thereof, in true or exhausted form, as an adulterant.

The embargo on the local distillation of clove stems has been withdrawn, with effect from the 1st July, 1935, and tenders for a licence to distil have been invited.

The chief commercial uses of cloves are as a spice, as an ingredient in certain forms of cigarette used in the Netherlands East Indies, and for distillation, yielding oil of cloves. No distillation has so far been carried out locally in Zanzibar. The chief value of the oil lies in its content of eugenol, which is converted chemically into vanillin, a substance much used for vanilla flavouring and as a basis for perfumes. Synthetic vanillin was formerly made almost entirely from eugenol derived

from clove oil and cinnamon leaf oil, but of recent years a process has been developed for the manufacture of vanillin from guaiacol, a substance prepared synthetically from coal-tar phenol, and the competition of guaiacol-vanillin with eugenol-vanillin has steadily increased. The ultimate outcome of this competition cannot be predicted, but the continued use of eugenol for the manufacture of vanillin will depend largely on the ability to stabilize the price of cloves at a level which will compete successfully with the synthetic alternative.

Coconuts.—It is estimated that there are about 3,850,000 bearing coconut palms in the country. The acreage under coconuts is estimated to be 45,000 acres in Zanzibar and 10,000 acres in Pemba. There is a good deal of admixture with cloves, but most of the cultivation is pure, coconuts occupying areas which are unsuitable for cloves. The average yield of nuts is taken at 30 per tree and it takes 6,200 nuts to produce one ton of copra. The nuts are generally small but rich in yield of oil. The copra qualities recognized by shippers to the European markets are Fair Merchantable Sun-dried (F.M.S.) and Fair Merchantable (F.M.). The quality is inferior (especially that of the F.M. grade) and it is the intention of the Government to take early measures with a view to improving the quality of the produce exported. Prices have recently been very low, and efforts are being made to reduce the cost of production. The amount exported represents less than 1 per cent. of the world's supply.

The exports and values of coconuts and copra for the last five years are:—

<i>Coconuts.</i>					
<i>Year.</i>	<i>Quantity.</i>	<i>Values.</i>	<i>Year.</i>	<i>Quantity.</i>	<i>Values.</i>
	<i>No.</i>	<i>Rs.</i>		<i>No.</i>	<i>Rs.</i>
1929	749,593	42,382	1932	876,188	28,960
1930	683,680	36,799	1933	925,161	24,365
1931	829,689	30,923			

<i>Copra.</i>					
<i>Year.</i>	<i>Quantity.</i>	<i>Values.</i>	<i>Year.</i>	<i>Quantity.</i>	<i>Values.</i>
	<i>Cwt.</i>	<i>Rs.</i>		<i>Cwt.</i>	<i>Rs.</i>
1929	334,071	4,707,661	1932	236,072	1,913,421
1930	255,963	3,213,286	1933	244,875	1,403,611
1931	235,380	1,995,690			

Other local products include millets, maize, sesame, rice, cassava, beans and peas, sweet potatoes, yams, groundnuts, chillies, native tobacco, cashew nuts, arrowroot, and ginger. Fruits include oranges, limes, grapefruits and other citrus fruits, Zanzibar oranges being classed as some of the best in the world. Other fruits are bananas, plantains, mangoes, pawpaws, pineapples, bread fruit, jack fruit, avocado pears, guavas, mulberries, pomegranates, durians, li-chees, etc. The areca nut tree abounds. All these are grown for local consumption, which in many cases, e.g., rice, millet, and pulses, exceeds the local supply; but there are small exports of fresh fruit to the mainland. There has been recently an increase in the production of cassava, rice, bananas and food crops generally.

2. FORESTRY.

There is no forestry industry in either Zanzibar or Pemba.

3. ANIMAL HUSBANDRY.

The latest available figures of domesticated animals in the Protectorate are as follows:—

Cattle	34,000	Horses	30
Goats	24,000	Mules	20
Asses	4,000	Sheep	100

(Approximate figures only are given.)

Cattle for slaughter purposes are imported mainly from Italian Somaliland and Italian Jubaland.

Cows are imported for milking purposes, almost exclusively from Kenya. The stock imported is either half-bred or three-quarter bred European.

Goats and sheep arrive mainly from Kenya and Italian East Africa. Although large numbers of females are imported they are almost entirely used for slaughter purposes.

A Government Dairy has been established in Zanzibar which provides an adequate supply of good milk for the town and ensures the exercise of the necessary supervision over the supply.

4. MINERALS.

There are no minerals of commercial importance.

Both in Zanzibar and in Pemba there are numerous outcrops of coral rock which are used for the making of lime and to supply stone for building and road-making.

5. FISHERIES.

The quantity of fish obtained in Zanzibar waters is only sufficient to meet local requirements. A great variety of fish is obtained.

The number of persons engaged in the fishing industry is about 4,600, mostly natives of the Protectorate, though a small number of Arabs, Comorians and natives of Diu (Portuguese India) are also engaged in the trade.

The number of fishing boats engaged in fishing is estimated to be 4,000.

B.

FOOD SUPPLY.

So far as the food supply of the native population is concerned Zanzibar is not self-supporting, although many varieties of grain, vegetables, and fruits are grown for local consumption as already noted in Section V. A. 1 above.

Considerable quantities of foodstuffs are imported into the territory both for non-native and native consumption, which could not be produced in the country under the existing agricultural economy.

The food imports in 1933 were valued at Rs.4,089,721, including the following:—

	Quantity.	Value. Rs.
Rice	386,023 cwt.	1,955,978
Wheat and wheat flour...	59,481 cwt.	400,071
Other grains and flour	90,853 cwt.	336,240
Cattle, goats, and sheep	11,933	209,098
Ghee	594,729 lb.	226,544
Sugar	87,438 cwt.	518,571

VI.—Industry (other than Agricultural) and Fishing.

No exact details regarding minor industrial activities in Zanzibar are available. A list of minor industries is given below, but no statistics are available as to the number of persons employed, etc.

Industry.	No.	Industry.	No.
Soap Factories	6	Bakeries	11
Ice Factories	2	Flour Mills	...
Soda Factories	4	Steam Oil Mills	...

VII.—Other Economic Activities.

Zanzibar was formerly the chief entrepôt port of the East Coast and though it has lost a considerable part of this trade to the modernized ports of Mombasa and Dar-es-Salaam, it has still retained an important entrepôt trade.

The trade classified in the Annual Trade Report of Zanzibar as re-export and that as transshipment are common in their characteristics and may be taken as representing the aggregate entrepôt trade of the port. Transshipment goods, i.e., goods usually imported by local merchants and re-shipped direct from the Customs Transit sheds are accordingly included as exports in the totals of the general trade of the Protectorate.

Re-exports.—Merchandise classified as re-exports during 1933 amounted to Rs.2,482,000 as compared with Rs.2,749,000 in 1932, Rs.2,952,000 in 1931, Rs.4,689,000 in 1930, and Rs.5,468,000 in 1929.

Transshipment Goods.—Goods entered in transshipment for immediate exportation were valued at Rs.462,000 in 1933 as compared with Rs.464,000 in 1932, Rs.678,000 in 1931, Rs.1,542,000 in 1930, and Rs.1,775,000 in 1929.

	Total Entrepôt Trade.				
	1929. Rs. '000	1930. Rs. '000	1931. Rs. '000	1932. Rs. '000	1933. Rs. '000
Re-exports	5,468	4,689	2,952	2,749	2,482
Transshipment Goods ...	1,775	1,542	678	464	462
	<u>7,243</u>	<u>6,231</u>	<u>3,630</u>	<u>3,213</u>	<u>2,944</u>

There is considerable inter-African trade between Zanzibar, Kenya, Tanganyika Territory, South Africa, Portuguese East Africa, Italian Somaliland, Egypt and French Somaliland.

In 1933 the inter-African imports into Zanzibar amounted to Rs.2,046,000 as compared with Rs.2,388,000 in 1932, Rs.2,531,000 in 1931, Rs.3,499,000 in 1930 and Rs.845,000 in 1929. The inter-African exports in 1933 amounted to Rs.1,467,000 as compared with Rs.1,581,000 in 1932, Rs.2,159,000 in 1931, Rs.4,430,000 in 1930 and Rs.5,232,000 in 1929.

VIII.—Communications.

The internal communications of Zanzibar and Pemba are by roads and sea. There are no railways, the narrow-gauge line which formerly ran from Zanzibar Town to Bububu having been closed down some years ago.

Zanzibar Island possesses an excellent system of metalled roads radiating from Zanzibar Town and giving access to all the Government Stations and principal villages in the island. The roads extend to 172 miles.

In Pemba Island there are 73 miles of roads consisting of a main road running from north to south along the central ridge of the island with branch roads connecting it with the ports of Wete, Chake-Chake, and Mkoani.

Communication between Zanzibar and Pemba is maintained by the Zanzibar Government steamers running a weekly service between Zanzibar Town and the Pemba ports of Wete, Chake-Chake, and Mkoani. Dhows and other native craft also carry a considerable amount of traffic between the islands and between the smaller ports of both.

The external communications of Zanzibar are mainly by sea but air transport, especially for mails, is developing. Though Zanzibar has now lost much of its former importance as the main seaport and distributing centre on the East African coast, its shipping is still considerable. It is a regular port of call for all steamship lines operating on the coast and the following table shows the lines and services visiting the port.

Line.	Between	Periodicity.	Remarks.
Union Castle Mail S.S. Co. ...	London and South Africa	Twice monthly	Alternately via Suez and Cape.
British India S.N. Co. ...	London and Beira	Monthly	Via Suez.
" " " " ...	Bombay and Durban	Fortnightly	—
" " " " ...	Lamu and Ibo	Fortnightly	Coasting Service.
India-African Line ...	Calcutta and Cape Town	Monthly	—
Messageries Maritimes ...	Marseilles and Madagascar	Fortnightly	Via Suez.
Deutsche Ost Afrika ...	Hamburg and South Africa	Fortnightly	Alternately via Suez and Cape.
Tirrenia (Italian) ...	Genoa and Zanzibar	Monthly	Via Suez.
Navigazione Libera Triestina ...	Italy and South Africa	Monthly	Via Suez or Cape.
Holland-Afrika ...	Rotterdam and South Africa	Fortnightly	Alternately via Suez and Cape.
K.P.M. (Dutch) ...	Java and South Africa	Monthly	—
O.S.K. (Japanese) ...	Japan East and South Africa and South America.	Monthly	—
Clan-Ellerman-Harrison ...	England and South Africa	Monthly	Cargo only.
Zanzibar Government Steamer ...	Zanzibar and Dar-es-Salaam	Weekly	—

The total number of vessels with their tonnages entered at the port for the year 1933 was as follows:—

				Sailing Vessels.		Steamers.	
				No.	Tonnage.	No.	Tonnage.
British ...	...	...	...	3,327	54,264	440	729,670
Foreign ...	...	...	...	198	10,660	204	822,420

Of foreign shipping in sailing ships the principal country was Arabia with 162 vessels and a tonnage of 9,416, and in steamers:—

		No.	Tonnage.			No.	Tonnage.
Dutch ...	...	54	102,799	Japanese ...	...	33	180,091
French ...	...	50	277,552	German ...	...	27	123,119
Italian ...	...	39	135,309				

The harbour of Zanzibar consists of an open roadstead affording good anchorage which can be entered from north or south in all weathers and at all states of the tide. Larger vessels lie at anchor and are discharged and loaded by means of lighters. There is a lighterage wharf of 800 feet, equipped with electric cranes and customs and storage sheds, capable of accommodating coasting ships up to 400 feet in length and 18 feet in draught, and in addition wharfage of 800 feet is available for dhows and native vessels.

The supply of drinking water is noted for its purity and vessels can be fully supplied without any delay beyond their normal stay in port.

Air.

A landing ground has been established four miles from Zanzibar Town and calls are made by Wilson Airways in their weekly services connecting with the Imperial Airways London-Cape Town service.

IX.—Customs Tariffs.

The Tariff, as revised in 1932 and 1933, provides for:—

- (i) specific, or special *ad valorem* duties on a number of scheduled articles;
- (ii) exemption from duty for a number of other scheduled articles; and
- (iii) a general 15 per cent. *ad valorem* duty on all other articles.

The basis of assessment of duty for *ad valorem* duties is now "current domestic value" plus all charges up to the time of importation.

Zanzibar is included in the Conventional Basin of the Congo, and in view of the international agreements relating thereto, it is not possible to adopt a policy of Imperial Preference.

X.—Trade Representatives.

His Majesty's Eastern African Dependencies Trade and Information Office, established at Grand Buildings, Trafalgar Square, London, W.C.2, is charged with the dissemination in the United Kingdom of information regarding East Africa, including Zanzibar, and the stimulation of East African trade in the United Kingdom. The office is under the control of a Commissioner, who is assisted by an Advisory Committee.

The United Kingdom Government has a Trade Commissioner in East Africa who is responsible for Zanzibar as well as for Kenya, Uganda, and Tanganyika Territory. His address is P.O. Box 220, Nairobi, Kenya. The Zanzibar Comptroller of Customs acts as Imperial Trade Correspondent in the Protectorate.

SOUTH AFRICA HIGH COMMISSION TERRITORIES

BASUTOLAND.

I.—Situation, etc.

The Territory of Basutoland lies between latitude 28°35' and 30°40' S. and between longitude 27° and 29°30' E. It has no sea coast, being bounded on the west by the Orange Free State, on the north by the Orange Free State and Natal, on the east by Natal and East Griqualand, and on the south by the Cape Province.

Geographically, the Territory may be divided into two regions running roughly from south-west to north-east, the eastern region comprising about two-thirds of the total area. The western region, a continuation of the Free State plateau, with an average altitude of some 5,000 feet, merges into the eastern area which comprises the Drakensberg Range with peaks rising to 11,000 feet, and dropping sharply down to Natal.

The area of the Territory is 11,716 square miles and is entirely a Native Area.

The climate is invigorating, and given a sufficiency of rain, pleasant. The temperature varies from a maximum of 93° F. to a minimum of 11° F. The rainfall is capricious, the average being approximately 30 inches, but it fluctuates much above and below that figure. The total annual rainfall in 1933 recorded at the different stations varied between 29.25 and 8.14 inches.

II.—Population.

The population of the Territory is composed almost entirely of a Bantu tribe called the Basuto, an offshoot of the Bechuana group. At the last census taken in 1921, the figures were a little short of 500,000. The estimated figure for to-day is approximately 600,000.

There are in addition some 2,000 Europeans, members of the Civil Service, missionaries and traders and about 1,500 non-European other than Bantu.

Little or no employment can be found for the Basuto in the Territory except for those as Government servants, teachers in the schools and employees of traders. The tribal occupation is that of peasant farmers, supplemented by wages earned in the Union as labourers on European farms or in one or other of the mining industries, gold, diamonds, and coal. Between 40,000 and 50,000 Basuto may be said to be absent in the Union at any one time engaged in work there.

III.—Finance.

A.—CURRENCY AND BANKING.

Under Proclamation No. 53 of 1932, all coins, other than silver coins, which are legal tender in the United Kingdom and all coins which are legal tender in the Union of South Africa are legal tender in the Territory. By the same Proclamation notes issued by the South African Reserve Bank were also declared to be legal tender in the Territory and under Proclamation No. 2 of 1933 the Bank was relieved of the condition of redeeming its notes on demand in United Kingdom coin or Union coin of legal tender. The Standard Bank of South Africa has a branch at Maseru.

B.—PUBLIC FINANCE.

1. *Public Debt.*

There is no public debt but the Administration has certain liabilities in connexion with the Guardian's Fund and Native Education Fund, which at the end of the financial year ended 31st March, 1933, amounted to £11,587 and £7,574 respectively.

2.(a) *Analysis of Revenue on the basis of the 1934-35 Estimates.**Self-balancing Department.*

	<i>Revenue</i>	<i>Expenditure</i>	<i>Net Surplus</i>
Posts and Telegraphs ...	£11,975	£10,775	£1,200

General Revenue.

	<i>£</i>	<i>Percentage</i>
I. Direct Taxes	117,350	48.9
II. Customs and Excise (including Wool Export Duty) ...	102,640	42.8
III. Fees of Court, etc.	1,350	0.6
IV. Licences, Interest, etc.	17,440	7.2
V. Surplus of self-balancing Department	1,200	0.5
	239,980	100
Revenue of self-balancing Department set off against		
Expenditure	10,775	
Total Revenue	£250,755	

2.(b) *Analysis of Customs Revenue.*

By an agreement with the Government of the Union of South Africa, Basutoland is dealt with for Customs purposes as part of the Union. A fixed percentage (0.88575) of the total collections in the Union is paid to Basutoland annually.

3. *Analysis of Expenditure on the basis of the 1934-35 Estimates.*

	£	Percentage
I. Administration	118,856	42·9
II. Economic Development	38,397	13·9
III. Social Services	103,826	37·4
IV. Non-effective (i.e., pensions)	16,018	5·8
	277,097	100
Expenditure of self-balancing Departments set off against Revenue	10,775	
Total expenditure	£287,872	

4. The Reserve Fund amounted to £60,000 on the 31st March, 1933.

5. The Territory has received no grants or loans.

IV.—Trade Statistics.

It is not possible, from the information available, to give details of the places of origin of the imports or the destination of the exports. All the trade is conducted through the Union of South Africa.

Year	Exports £	Imports £
1930 ...	317,626	477,949
1931 ...	251,427	462,733
1932 ...	308,278	455,111
1933 ...	330,157	611,110

Principal Exports, 1933.

Article	Total Quantity	Total Value £
<i>Class I.</i>		
Wheat and Wheat Meal ...	55,822 bags*	45,102
Cattle	17,491	41,665
Sheep and Goats	3,831	1,423
<i>Class II.</i>		
Wool	9,864,043 lb.	196,146
Mohair... ..	1,926,180 „	26,697
Hides and Skins	1,361,374	17,128

* The net weight of a bag is 200 lb.

Principal Imports, 1933.

Article	Total Quantity	Total Value £
<i>Class I.</i>		
Maize and Maize Meal ...	356,158 bags	217,007
Kaffir Corn	25,018 „	17,028
Wheat and Wheat Meal ...	8,675 „	10,381
<i>Class III.</i>		
General Merchandise... ..	—	362,986

V.—Natural Resources.

A.

1. AGRICULTURE.

Maize is the main crop grown in the Territory, and is the staple food of the Basuto. During the year 1933, 200,000 acres were estimated to be under maize, but owing to the exceptional drought conditions which prevailed, approximately only 334,000 bags were reaped, insufficient for local needs, and 356,000 bags were imported.

Kaffir-corn was grown to the extent of some 81,000 acres, but only 147,000 bags were reaped, and 25,000 bags had to be imported.

Wheat is grown as a money crop, very little is eaten by the Basuto and almost the entire output is exported to the Union. Owing to drought conditions the acreage under wheat and the crop were restricted, some 90,000 acres being sown and 125,000 bags reaped. The normal acreage and production are 120,000 acres and 350,000 bags.

A certain amount of maize and maize meal, kaffir corn, and wheat and wheat meal is exported each year. Exports during the past five years have been:—

Year	Maize and Maize Meal		Kaffir Corn		Wheat and Wheat Meal	
	Quantity in bags	Value in £	Quantity in bags	Value in £	Quantity in bags	Value in £
1929 ...	87,404	42,144	37,056	21,334	72,103	64,408
1930 ...	6,061	2,169	4,032	2,372	131,308	105,330
1931 ...	295	168	10,247	6,821	103,706	90,888
1932 ...	1,908	765	6,500	3,461	196,873	168,015
1933 ...	107	71	1,561	806	55,822	45,102

Peas, Beans, Barley and Oats are also grown, but not to the extent which might be desired.

2. FORESTRY.

There are no forests in Basutoland.

3. ANIMAL HUSBANDRY.

Great importance is attached to the breeding and care of sheep and goats, and by an extensive system of dips and supervision a large measure of success in the eradication of scab has been attained. Drought has taken toll of small stock, and it is estimated that during 1933 flocks were reduced by nearly half a million. The estimated totals in the Territory are 1,500,000 sheep and 530,000 goats.

Cattle have, owing to overstocking and deterioration of the pasturage, declined in quality. The mortality during 1933 was exceedingly heavy and it is estimated that some 120,000 died during the drought, and some 28,000 were exported into the Union as trek oxen. The approximate number of cattle left in the Territory is over 400,000.

Horses. The old stamp of Basuto pony, of sturdy build, sure footed and hardy, so much sought after in South Africa, is almost a thing of the past. Overstocking and deterioration of pasturage have left their marks, but the Administration is making efforts to improve the present type of Basuto pony by means of a Government Stud.

Slaughter cattle are exported to the Union of South Africa and there is a large export trade in wool and mohair. Exports during the last 5 years have been:—

Year		Cattle		Wool		Mohair		Hides and Skins	
		No.	Value in £	Quantity in lb.	Value in £	Quantity in lb.	Value in £	No.	Value in £
1929	...	1,496	6,678	12,937,198	436,083	1,961,746	94,352	810,325	23,453
1930	...	3,617	14,121	9,729,169	156,601	942,725	21,837	731,387	9,791
1931	...	8,337	27,616	9,325,140	98,304	1,241,743	21,442	305,634	2,692
1932	...	5,668	15,947	14,524,766	105,435	1,015,034	10,136	146,688	873
1933	...	17,491	41,665	9,864,043	196,146	1,926,180	26,697	1,361,374	17,128

4. MINERALS.

No geological survey of the Territory has ever been made, and no minerals are known to exist with the exception of a meagre out-crop of coal here and there.

5. FISHERIES.

There are no fisheries in Basutoland. Fish are caught in the rivers, but there is no trade.

B.**FOOD SUPPLY.**

Basutoland is not self-supporting in the way of food supplies, particularly for the European population. The Basuto are not great eaters of meat and subsist in the main on maize and kaffir corn. Like most native races, they are improvident and dispose of any surplus over their immediate requirements. A large quantity of the grain so sold is held by the traders and re-sold to the Basuto. Any importation of grain comes from the Union of South Africa.

VI.—Industry.

There is little or no industrial activity. A power plant in Maseru, printing works at Morija and Mazenod, and garages at some of the larger camps furnish the only industrial work open to the Basuto.

VII.—Other Economic Activities.

There are none in Basutoland.

VIII.—Communications.

The internal communications of Basutoland are by road, as the South African Railway stops short at Maseru.

In 1933 there were 492 miles of road in Basutoland, consisting of 360 miles of main road and 132 miles of feeder road. The system of roads consists of a main road running along the western border of Basutoland with feeder roads pushed out to the various trading stations. Owing to the mountainous nature of the Eastern part of the Territory no roads can be built, and animals are the sole means of travel and transport. Motor services of the South African Railways operate between various rail heads in the Union and Government camps in Basutoland.

IX.—Customs Tariff.

By an agreement made in June, 1910, Basutoland is dealt with for Custom purposes as part of the Union. A fixed percentage of the total custom collection in the Union is paid to Basutoland annually.

X.—Trade Representatives.

Basutoland has no Trade Representatives.

BECHUANALAND PROTECTORATE.

I.—Situation, etc.

The Bechuanaland Protectorate has no sea coast being bounded on the south and east by the Union of South Africa, on the north-east by Southern Rhodesia and on the north and west by the Mandated Territory of South West Africa.

It has not been fully surveyed, but its area is estimated at 275,000 square miles. Its mean altitude is about 3,300 feet.

The eastern portion of the country has some fine hill scenery. The remainder, though it appears at first sight to be very flat, is, in reality, undulating and is rich in grasses, shrubs, and trees. There are occasional outcrops of limestone, and the surface generally is sandy and, except where boreholes and dams have been established, waterless. Old and well-defined river courses indicate, however, that at one time the country was well-watered, as is still the case north and north-east of Lake N'gami. There is reason to believe that good underground waters exist, and development in this direction will be undertaken as soon as the Territory is able to provide funds for the purpose.

The climate of the country is sub-tropical varying to temperate.

Provided the necessary precautions are taken to guard against malaria, which is universal in the low-lying areas of the Territory, and provided sufficient outdoor exercise is taken, the climate is well suited to Europeans and their families.

The rainfall varies very much from year to year, and place to place and in 1933 showed figures varying from 12·60 inches to 25·67 inches.

II.—Population.

No vital statistics are available. The vast area of the Territory, with a widely scattered population and a relatively small number of officials, have made it impossible for the Government to collect data which would be of any value.

The inhabitants of the Protectorate consist of Europeans, Natives, Asiatics, and coloured persons. The following table shows the figures as at the last census taken in 1921:—

Europeans	Asiatics and Coloured	Natives	Total
1,743	1,055	150,185	152,983

III.—Finance.

A.—CURRENCY AND BANKING.

Banks.—During 1934 the Standard Bank of South Africa, Limited, established a Branch at Francistown. This is the only bank in the Territory at present.

Currency.—Under Proclamation 54 of 1932, all coins, other than silver coins, which are legal tender in the United Kingdom and all coins which are legal tender in the Union of South Africa are legal tender in the Territory. By the same Proclamation notes issued by the South African Reserve Bank were declared to be legal tender in the Territory, conditional upon the said Bank continuing on demand to redeem its notes in United Kingdom coin or Union coin of legal tender, but this condition was suspended by the Currency Amendment Proclamation No. 3 of 1933.

B.—PUBLIC FINANCE.

1. *Public Debt.*

There is no Public Debt.

2.(a) *Analysis of Revenue (on basis of 1934-35 Estimates).**Self-balancing Department*

	Revenue	Expenditure	Net Surplus
Posts and Telegraphs	£17,545	£5,760	£11,785

General Revenue

	£	Percentage
I. Customs and Excise	27,825	35·6
II. Licences, Revenue Stamps, Fines, etc....	5,850	7·5
III. Direct Taxes	28,200	36·1
IV. Miscellaneous	4,495	5·7
V. Surplus on self-balancing Department ...	11,785	15·1
	78,155	100
Revenue of self-balancing Department set off against		
Expenditure	5,760	
Revenue from Colonial Development Fund ...	600	
	£84,515	

2.(b) *Analysis of Customs Revenue.*

By an agreement with the Government of the Union of South Africa, the Bechuanaland Protectorate is dealt with for Customs purposes as part of the Union. A fixed percentage, 0·27622 per centum, of the total collections in the Union is paid to the Bechuanaland Protectorate annually.

3. *Analysis of Expenditure (on basis of the 1934-35 Estimates).*

	£	Percentage
I. Administration	73,810	44·9
II. Economic Development	50,423	30·7
III. Social Services	28,155	17·2
IV. Non-effective (Pensions, etc.)	11,890	7·2
	164,078	100
Expenditure of self-balancing Department set off against Revenue	5,760	
Expenditure from Colonial Development Fund ...	600	
	£170,438	

4. The Protectorate has no Reserve Funds.

5. The following grants have been received from the Imperial Treasury.

(1) Expenses of Administration £177,000. 1933-34.

(2) Colonial Development Fund.

Grants from the Colonial Development Fund have been authorized for the following purposes:—

	£
Tsetse Fly Investigation	2,265
Preparation of Water Scheme	895
Walvis Bay Railway Survey	2,002
Additions to Hospital	3,770
Demonstration Creamery... ..	200
Economic Mission	1,640
N'gamiland Waterways	400
	11,172

IV.—Trade Statistics.

The trade statistics do not give full details regarding the place of origin of the imports or the destination of exports, but there is comparatively little direct trade with countries other than the Union of South Africa and Northern and Southern Rhodesia.

EXPORTS.

(i) *Total Exports (including Bullion and Specie).*

	£
1930-31	216,732
1931-32	179,831
1932-33	159,870
1933-34	27,964

(ii) *Total Exports by Classes 1933.*

To	Class I. £	Class II. £	Class III. £	Class IV. £	Class V. £	Total. £
Union of South Africa	3,106	735	744	—	—	4,585
Southern Rhodesia	—	84	47	—	22,280	22,411
Northern Rhodesia	—	123	—	—	—	123
Other Countries	—	845	—	—	—	845
	3,106	1,787	791	—	22,280	27,964

(iii) *Principal Exports, 1933.*

Article	Total Quantity	Total Value £	Principal countries of destination with amounts in £.
<i>Class I.</i>			
Cattle	715	2,918	Union of South Africa (all).
<i>Class II.</i>			
Hides and Skins	—	1,664	Union of South Africa (735).
<i>Class V.</i>			
Gold... ..	5,525 oz.	22,280	Southern Rhodesia (all).

IMPORTS.

(i) *Total Imports (including Bullion and Specie).*

	£
1930-31	237,085
1931-32	215,861
1932-33	176,003
1933-34	150,896

(ii) *Total Imports by Classes 1933-34.*

<i>From</i>	<i>Class I.</i> £	<i>Class II.</i> £	<i>Class III.</i> £	<i>Class IV.</i> £	<i>Total Merchandise</i> £
Union of South Africa ...	20,528	—	77,945	50	98,523
Southern Rhodesia ...	8,197	—	28,157	—	36,354
Northern Rhodesia ...	32	—	1,161	—	1,193
Other Countries ...	789	—	14,037	—	14,826
Total ...	29,546	—	96,000	50	150,896

(iii) *Principal Imports, 1933-34.*

<i>Article</i>	<i>Total Quantity</i>	<i>Total Value £</i>	<i>Principal countries of origin with amounts in £.</i>
Class I.			
Mealie Meal ...	19,977 bags*	11,739	Union of South Africa (5,991), Southern Rhodesia (5,742).
Kaffir Corn ...	17,589 "	10,847	Union of South Africa (9,276), Southern Rhodesia (810).
Wheat and Wheat Meal	2,692 "	4,125	Union of South Africa (3,430), Southern Rhodesia (650).
Mealies ...	4,750 "	2,835	Union of South Africa (1,831), Southern Rhodesia (995).
Class III.			
General Merchandise ...	—	118,904	Union of South Africa (75,749), Southern Rhodesia (27,957), Northern Rhodesia (1,161).
Vehicles ...	13	2,396	Union of South Africa (2,196).

* The net weight of a bag is 200 lb.

V.—Natural Resources.**A.****1. AGRICULTURE.**

Maize and Kaffir Corn are the staple crops of the Bechuanaland Protectorate but owing to the phenomenal drought of 1933—the worst ever remembered by the oldest of its inhabitants—crops were almost a complete failure.

Spineless Cactus is grown with a certain amount of success in the Tuli Block.

One acre of Virginian *Tobacco* was also grown in that District and small quantities, for local consumption only, were produced in the Kgalagadi, Kanye, Gaberones, Chobe and Ghanzi Districts.

Cotton growing has been tried from time to time but owing to difficulties of weather conditions and lack of ginning facilities it has been abandoned.

It is not possible to state the acreage of land under cultivation; but every effort is being made by the Administration to improve native methods of agriculture by demonstration plots and by posting trained native agricultural demonstrators over as wide an area as possible.

The schools too are encouraged to take an active interest in gardening and the production of useful vegetables and crops.

2. FORESTRY.

There are forests in the northern part of the Territory, but there is as yet no Forestry Department and no timber is exported.

3. ANIMAL HUSBANDRY.

Cattle, sheep, and goats are largely reared by the inhabitants of the Territory, the greater portion being native owned, and, at present, of poor quality.

The small element of European farmers are, however, progressive as far as possible, and the efforts of the Administration are constantly directed towards educating the native population in better methods of cattle and sheep rearing and in the improvement of their stock generally by means of importations of pure breeds, by exchange, by castration, and by improved pasture.

Everything possible is also being done towards the provision of better watering facilities, both in the form of conservation of surface waters as well as by boring and well sinking.

All stock diseases are under the control of the Veterinary Department which had a heavy time in 1933 in coping with the foot-and-mouth outbreak which occurred that year and upon which it was decided to inoculate wholesale—with a view to saving the country from an indefinite period of quarantine and consequent disaster to both farming and trade.

Other stock diseases which are found in the Territory and which occupy the attention of the Department are anthrax, quarter evil, trypanosomiasis, paratyphoid, and scab.

There is a considerable export of cattle, dairy produce, hides and skins, etc.; the figures for the last five years are as follows:—

<i>Year</i>	<i>Cattle</i>		<i>Hides and Skins</i>		<i>Butter</i>		<i>Butterfat</i>		<i>Sheep and Goats</i>	
	<i>No.</i>	<i>Value in £</i>	<i>Quantity in lb.</i>	<i>Value in £</i>	<i>Quantity in lb.</i>	<i>Value in £</i>	<i>Quantity in lb.</i>	<i>Value in £</i>	<i>Head</i>	<i>Value in £</i>
1929-30 ...	30,673	141,148	1,288,629	43,206	383,688	34,089	239,691	17,977	14,703	10,748
1930-31 ...	28,177	114,469	1,229,886	21,449	473,572	29,610	158,648	8,076	10,070	4,028
1931-32 ...	25,927	93,196	870,452	11,184	585,392	34,155	126,198	7,316	7,636	4,268
1932-33 ...	25,103	94,136	1,415,876	5,463	462,008	24,732	40,811	1,660	11,160	8,370
1933-34 ...	715	2,918	994	158	—	—	2,626	91	126	63

4. MINERALS.

No geological survey of the Bechuanaland Protectorate has yet been made.

Prospecting and mining is governed by the Mines and Minerals Proclamation No. 33 of 1932, which came into force on 12th August, 1932, and the Regulations thereunder published under High Commissioner's Notices No. 111 dated 12th August, 1932, and No. 157 dated 21st October, 1932. It should be noted, however, that the Tati District is presently excluded from the provisions of the Proclamation.

The Tati District where the mineral rights are vested in the Tati Company, Limited, and which is at present excluded from the provisions of the Proclamation, is the only portion of the Territory where minerals (gold and silver) have been worked to any extent. Here, in 1933 a considerable revival took place and gold and silver recoveries during the year amounted to £24,747, being £15,666 in excess of the previous year's productions.

Exports of gold during the past five years have been as follows:—

Year	Quantity in fine oz.	Value in £
1929-30	1,725	7,224
1930-31	1,997	8,391
1931-32	1,302	5,470
1932-33	—	—
1933-34	5,525	22,280

5. FISHERIES.

There are no fisheries in the Bechuanaland Protectorate. Fish are caught in some of the rivers, but there is no trade.

B.**FOOD SUPPLY.**

Neither the European nor the native population is entirely self-supporting as regards food supplies and a considerable amount of kaffir corn, mealies, etc., and general merchandise is imported annually, though certain tribes husband their surplus supplies.

The natives in most parts are improvident and do not conserve grain against a future possible shortage, and as a result of unprecedented drought and severe locust invasions during 1933 the Administration was obliged to expend large sums of money in famine relief work.

VI.—Industry.

The dairy industry, including cheese production, is the only one of any magnitude in the territory. There are two creameries, at Francistown and Lobatsi respectively, and of recent years much progress and development have been effected, though, as a result of the economic repercussions of foot-and-mouth disease, which included the closing of the neighbouring markets to dairy products, the industry was hard hit in 1933.

A poultry industry is being worked up and shows signs of promising results.

VII.—Communications.

The main line of the Rhodesian Railways Limited, passes through the territory on its eastern side for a distance of 400 miles entering from the south at Ramathlabama and leaving again at Ramaquabane.

There are tolerably good roads for motor transport from railway stations and sidings to the principal villages, and there is a fairly good road for motor traffic all the way from south to north of the Territory.

On the sandy tracts where the going is very heavy, travelling is done by means of Cape-carts or ox-wagons, but the light motor lorry is gradually replacing this form of transport as far as the Europeans are concerned.

One road motor service is operated in the Territory by the Union Railway Authorities.

There are numerous landing grounds for the use of air pilots who may visit the Bechuanaland Protectorate.

VIII.—Customs Tariff.

Under the Customs Agreement entered into with the Union of South Africa in 1910 the Bechuanaland Protectorate Administration receives annually a percentage of the total Customs Revenue of the Union.

IX.—Trade Representatives.

The Bechuanaland Protectorate has no Trade Representatives.

SWAZILAND.**I.—Situation, etc.**

The Swaziland Protectorate lies approximately between latitude 25°40' S. and 27°20' S. and longitude 31° and 32° E. It has no sea coast, being bounded on the north, west and south by the Province of Transvaal, and on the east by Portuguese East Africa and the Natal Province of the Union of South Africa.

The Territory is divided geographically into three regions, running roughly from north to south and of equal width; the high, middle, and low or bushveld regions. The high veld portion adjoining the eastern Transvaal consists of mountains, part of the Drakensburg range, rising in

places to an altitude of over 5,000 feet. The middle veld is about 2,000 feet lower, while the bush veld, bounded on the east by the Ubomba mountains, has a height of from 200 to 1,000 feet.

The area of the territory is 6,704 square miles. About one-third of the country is a Native Area, the remainder being owned by Europeans.

Climatic conditions are not uniform throughout the Protectorate, but the temperature is moderate and no great extremes of heat and cold are experienced. In the high veld portion, the mean maximum and minimum temperatures for 1933 were 72·2 and 50·5 degrees Fahrenheit, and in the middle veld 82·1 and 54·5 degrees Fahrenheit respectively. The highest maximum temperature recorded in 1933 was 101·1 degrees.

The total annual rainfall in 1933 varied at the different stations between 45·61 inches and 35·69 inches.

II.—Population, etc.

The inhabitants of the Protectorate can be classified in four groups—Europeans, Bantu, Indians and coloured people. The most numerous are the Bantu, a tribe akin to the Zulu, called the Swazi, who at the last census in 1921 numbered 110,296, the estimate for 1933 being 122,290. The estimated numbers of non-natives in the Protectorate at the end of 1933 were:—

European	...	...	...	2,775
Coloured	...	...	...	700
Indians	...	...	...	10

making a total for the whole Protectorate at that date of about 126,775. Classification of employment is made on the basis of European and other races. The details are as follows:—

	European	Other Races
Government Employment (including transport)	126	561
Agriculture	610	3,200
Industry and Manufacture	34	600
Domestic Service	—	500
Employment in the Union of South Africa (including those recruited for the gold mines on the Witwatersrand)	—	10,770

The figures given are approximate.

III.—Finance.

A.—CURRENCY AND BANKING.

Under Proclamation No. 55 of 1932, all coins other than silver coins, which are legal tender in the United Kingdom and all coins which are legal tender in the Union of South Africa are legal tender in the Territory. By the same Proclamation notes issued by the South African Reserve Bank were also declared to be legal tender in the Territory and under Proclamation No. 4 of 1933 the Bank was relieved of the condition of paying its notes on demand in United Kingdom coins or Union coins of legal tender. Two banks are in operation, the Standard Bank of South Africa, and Barclays Bank (Dominion, Colonial and Overseas).

B.—PUBLIC FINANCE.

1. Public Debt.

The public debt of the Territory amounted to £55,000 and consisted of the Swaziland Consolidated Loan, amounting to £35,000 and the Swazi Nation Trust Fund, amounting to £20,000. The former loan bears interest at the rate of 3½ per cent. and is repayable by a sinking fund in 19 years from the 1st April, 1924. The latter bears interest at the rate of 4 per cent. per annum.

2.(a) Analysis of Revenue (on the basis of the 1934-35 Estimates).

Self-balancing Department.

	Revenue	Expenditure	Net Surplus
Posts and Telegraphs ...	£5,615	£4,541	£1,074

General Revenue

(Excluding grants from the Colonial Development Fund).

	£	Percentage
I. Customs and Excise	15,550	17·9
II. Fees of Court, etc.	1,250	1·2
III. Direct Taxes	46,300	54·2
IV. Licences, Internal Revenue, Rents, and Miscellaneous	21,700	25·5
V. Surplus	1,074	1·2
	85,874	100
Revenue of self-balancing Department set off against Expenditure	4,541	
Total Revenue	£90,415	

2.(b) Analysis of Customs Revenue.

By an agreement with the Government of the Union of South Africa, Swaziland is dealt with for Customs purposes as part of the Union. A fixed percentage (0·149 per cent.) of the total collections in the Union is paid to Swaziland annually.

3. *Analysis of Expenditure (on basis of 1934-35 Estimates).*

(Excluding grants from the Colonial Development Fund).

	£	Percentage
I. Debt Charges	3,680	3.3
II. Administration	50,109	45.1
III. Economic Development	14,311	12.9
IV. Social Services	38,654	35.0
V. Defence	—	—
VI. Non-effective (pensions, etc.)	4,216	3.7
	110,970	100
Expenditure of self-balancing Department set off against Revenue	4,541	
Total Expenditure	£115,511	

4. The Protectorate has no Reserve Funds.

5. The following grants have been received from the Imperial Treasury since 1928:—

Year	Expenses of Administration £	Capital Expenditure £	Grants for Loans to settlers £
1928	12,500	20,000	—
1929	15,000	17,000	6,000
1930	—	—	5,000
1931	19,500	2,500	10,000
1932	27,900	—	1,100
1933	28,500	—	1,500

Grants from the Colonial Development Fund have been authorized for the following purposes:—

	£
River Crossings	1,833
Ngwempisi Low Level Bridge	1,378
Road Equipment	3,581
Telephone (Hlatikulu-Kubuta)	1,051
Mbabane Hospital	5,372
Venereal Diseases Clinics	1,213
Dam at Gollel	178
Conservation of Water	2,989
Bremersdorp Water Supply... ..	8,000
Butter and Cheese Factory	6,500
Medical Outposts	450
Bridge at Sipofaneni... ..	9,630
Telephones to Mankaiana and to Goba	4,490
	46,665

IV.—Trade Statistics.

No statistics of Imports are kept. All imports are from the Union of South Africa and Portuguese East Africa.

EXPORTS.

(i) *Total Exports.*

Year	Value £
1930... ..	139,662
1931... ..	80,252
1932... ..	71,407
1933... ..	129,035

(ii) *Domestic Exports by Classes, 1933.*

To	Class I. £	Class II. £	Class III. £	Class IV. £	Class V. £	Total Merchandise £
Union of South Africa	76,884	30,161	—	—	3,914	110,959
Portuguese East Africa... ..	199	—	—	—	—	199
	77,083	30,161	—	—	3,914	111,158

In addition there were exports of bullion and specie to the value of £17,877 to the Union of South Africa.

(iii) *Principal Domestic Exports, 1933.*

Article	Total Quantity	Total Value £
Class I.		
Cattle	4,286 tons	62,400
Tobacco	377,906 lb.	10,010
Butterfat	86,690 „	3,973

(iii) *Principal Domestic Exports, 1933—continued.*

<i>Article</i>	<i>Total Quantity</i>	<i>Total Value</i> £
<i>Class II.</i>		
Tin Ore	101 tons	16,605
Hides and Skins	439,820 lb.	5,910
Wattle bark	1,332,000 "	1,653
Cotton Seed	207,000 "	1,400
Wool	17,138 "	533
<i>Class V.</i>		
Gold	630 oz.	3,914

With the exception of a small amount of butter and butterfat, all products are exported to the Union of South Africa, from whence the cotton is shipped to the United Kingdom and the tin ore to the Straits Settlements for smelting.

V.—Natural Resources.

A.

1. AGRICULTURE.

The resources of the Protectorate are principally agricultural. The majority of Europeans are farmers. The rearing of livestock is the most important branch of this activity.

The native inhabitants have only a small portion of the land available to them under cultivation, and that for purely domestic purposes. It is not possible to estimate the acreage of land under cultivation, but the greater part of it is used for grazing purposes.

The chief crops grown by the Europeans are maize, kaffir corn, and tobacco. Cotton is grown to a small extent. Attempts to improve native agricultural methods are bearing fruit, in the more general use of kraal manure, and in the fact that in 1933 the natives grew almost sufficient food-stuffs to support themselves.

Tobacco.—The Swaziland Co-operative Tobacco Company controls the growth of tobacco in the Territory. In 1933 it had a membership of over 200, and 377,906 lb. of tobacco were exported valued at £10,010.

Maize.—The greater part of the maize grown in Swaziland is sold locally. European farmers obtain approximately 3½ bags per acre for this crop.

Tung Oil.—Tung oil trees are being planted and there is every indication that this may develop into a very useful commercial crop.

Cotton.—The Empire Cotton Growing Corporation has a station at Bremersdorp; owing to the low prices obtainable, and unsatisfactory weather conditions, cotton is not grown to any great extent.

The principal agricultural exports during the past five years have been as follows:—

<i>Year</i>	<i>Cotton Seed</i>		<i>Tobacco</i>	
	<i>Quantity in lb.</i>	<i>Value in £</i>	<i>Quantity in lb.</i>	<i>Value in £</i>
1929 ...	2,618,913	37,961	1,068,400	35,613
1930 ...	3,224,182	26,868	578,330	14,397
1931 ...	1,531,887	9,574	312,180	7,804
1932 ...	750,000	3,125	341,055	10,850
1933 ...	207,000	1,400	377,906	10,010

2. FORESTRY.

There are no forests in the Territory. In the higher portions, *wattle* is grown for commercial purposes, the bark being used for the tanning industry in the Union of South Africa. Wattle seed is issued to natives, who are encouraged to plant trees to prevent soil erosion. No timber is exported.

3. ANIMAL HUSBANDRY.

The majority of stock in Swaziland is native owned, the Europeans having 36,123 head of cattle in their possession, out of a total of 414,971 head. Native-owned cattle are generally of poor quality, and their large numbers lead to a great deal of over-grazing with consequent soil erosion and deterioration of pastures.

The ownership of cattle, irrespective of quality, is regarded as a sign of wealth by the natives, and it is a matter of the utmost difficulty to persuade them to sell their stock, or to take measures to improve them.

The Veterinary Department has taken steps to combat the overstocking of native areas, and to improve the quality of native herds.

All stock diseases are under the control of the Veterinary Department. An outbreak of East Coast fever, the first for some years, occurred in 1933. A large measure of success has been achieved in lessening and eradicating stock diseases. No figures are available, but it is estimated that, apart from cattle slaughtered for human consumption, the mortality is about 10 per cent.

Swaziland is entirely self-supporting in animal products. 9,292 head of cattle and some 30,384 hides were exported during 1933. These latter figures include the skins of game.

The overstocking of the Territory has not only affected the grazing but also the watering facilities of the country. To counteract the latter, dams have been constructed in many parts of the country, and the position has now been alleviated to some extent.

The following table shows the principal exports of animal products during the last five years :

Year	<i>Slaughter Oxen</i>		<i>Hides and Skins</i>		<i>Wool</i>	
	Value in £		Quantity in lb.	Value in £	Quantity in lb.	Value in £
1929	85,000	434,840	7,050	3,600	150	
1930	50,763	208,140	3,469	27,091	909	
1931	33,322	143,737	1,590	72,134	1,636	
1932	23,728	60,750	633	30,000	490	
1933	62,400	439,820	5,910	17,138	533	

4. MINERALS.

No geological survey of the Protectorate has ever been made. A number of minerals are known to exist, including gold, tin, coal, asbestos, copper, iron-ore, and cinnabar. Of these, tin, gold, and asbestos are mined in the Northern District, asbestos and some gold in the Pigg's Peak sub-district, and tin and gold in the Mbabane sub-district.

The tin is alluvial, and the plentiful water supply in the area makes mining comparatively easy and economical. Mineral areas aggregating 2,475 square miles have been thrown open for general prospecting and mining.

Clay, sand, and stone are produced locally for building and road-making. No figures of quantities are available.

Exports of tin ore and gold during the last five years have been as follows:—

Year	<i>Tin Ore</i>		<i>Gold</i>	
	Quantity in tons	Value in £	Quantity in oz.	Value in £
1929	186	38,692	90	382
1930	161	23,414	—	—
1931	77	8,875	—	—
1932	84	11,497	365	1,542
1933	101	19,665	630	3,914

5. FISHERIES.

There are no fisheries in Swaziland. Fish are caught in some of the rivers, but there is no trade.

B.

FOOD SUPPLY.

Neither so far as the native population, nor so far as the European population is concerned, is Swaziland self-supporting in food supplies. Owing to the conservative nature of the people, only enough maize is grown to meet immediate requirements, any surplus being sold or converted into "Kaffir Beer". There have been few actual cases of famine amongst the natives, as the number of cattle in the Territory is more than sufficient to supply the population with meat.

Maize is imported from the Transvaal when the local supply has been exhausted.

VI.—Industry.

Industrial activities are few. At all stations in the country motor repair depots and garages are in existence. Electric lighting plants at Mbabane and Bremersdorp, both driven by water power, a soda-water factory at Bremersdorp, a tobacco factory at Goedgegun and sundry mineral workings comprise the total of industrial concerns. At Mbabane and Bremersdorp there are printing works.

The South African Railways and Harbours Administration have a depot at Bremersdorp, and a workshop for their motor omnibuses.

The establishment of a butter factory at Bremersdorp is under consideration.

VII.—Other Economic Activities.

There is little entrepôt or transit trade in Swaziland. Tourist traffic is of some importance, and travellers find that the route through Swaziland is a short and convenient one from the Transvaal to Lourenço Marques, and to the Kruger National Park. No figures are kept, but the cash value of the traffic must be fairly substantial.

Many visitors come in during the winter months for game shooting, and to visit the hot sulphur springs in various parts of the country. Over 400 visitors were recorded at the Sipofana Hot Springs during last year. A small charge is made for camping.

VIII.—Communications.

The internal communications of Swaziland are by road. There are no railways or air services. The rivers are not navigable. All centres are connected by roads which are passable at all seasons of the year. During the summer months the Hlatikulu-Bremersdorp and the Bremersdorp-Mankaiana roads are liable to be blocked for short periods owing to the sudden rising of the Great Usutu River. A low level bridge is in the course of construction over this river on the former route.

In 1933 there were 1,127 miles of road in Swaziland, consisting of:—

	Miles
Trunk Roads (Class I)	257
Class II Roads	475
Class III Roads	395

Motor services of the South African Railways operate throughout the country, connecting up all the principal centres with various railheads.

IX.—Customs Tariff.

By an agreement made in June, 1910, Swaziland is dealt with for Customs purposes as part of the Union. A fixed percentage of the total collection in the Union is paid to Swaziland annually.

X.—Trade Representatives.

Swaziland has no trade representatives.

WEST AFRICA

GAMBIA.

I.—Situation, etc.

The Gambia Colony and Protectorate are situated on the West Coast of Africa. The Colony, which comprises the towns of Bathurst and Georgetown and some adjoining land, has an area of only 69 square miles. The Protectorate comprises an area of about 4,000 square miles and consists of a narrow strip of territory approximately ten kilometres wide on each bank of the River Gambia and three hundred miles in length. The river rises in the Futa Jallon plateau and flows westwards for nearly 700 miles. It is navigable for ocean-going steamers as far as Kuntau-ur, 150 miles up river, and for vessels drawing less than two fathoms as far as Koina, 292 miles from Bathurst. The river is tidal throughout its length in British territory; during the rains it rises some 30 feet in the upper reaches.

The seat of Government is at Bathurst, 13° 27' N. latitude 16° 34' W. longitude, situated on Saint Mary's Island at the mouth of the river.

The climate of the Gambia is not healthy, though, with modern methods of sanitation and housing, conditions of living have greatly improved during recent years. The most trying part of the year is from June to October, which is the wet period. During the remaining months the climate compares favourably with that of other tropical countries. The rainfall varies from 35 to 55 inches annually, July, August, and September being the wettest months.

All land in the Colony, not already in private ownership, is Crown land and the Governor has power to grant both freehold and leasehold interests. Land in the Protectorate is vested in the Chiefs as trustees for the village communities but in the case of certain Wharf Towns on both banks of the river leases may be obtained from Government.

II.—Population.

According to the 1931 Census the total population was 199,520, the population of the Colony being 14,370 and that of the Protectorate 185,150, the latter having a density of 46.3 persons to the square mile. There is a small non-African population in Bathurst but the great bulk of the population are natives of Africa. The estimated population at the end of 1933 was 14,500 in the Colony and 193,724 in the Protectorate, making a total of 208,224.

Farming is the principal occupation of the people. The country is unsuitable for European settlers and there are no permanent plantations or estates, the whole of the cultivation being carried out by the natives in what is usually described as "shifting" cultivation.

There is very little permanent emigration or immigration. At the commencement of each groundnut planting season a number of natives cross the border into the Protectorate from French territory for the purpose of assisting the local farmers in the planting and harvesting of the crop. These "strange farmers," however, return to their homes after the crop has been marketed. Similarly some hundreds of foreign labourers and petty traders visit Bathurst during each trading season (roughly from November to May).

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the pound, maintained at par with sterling by the West African Currency Board which issues and redeems currency in the four British West African Colonies against deposits and withdrawals of sterling in London. The media of circulation consist of £1 and 10s. notes, and alloy and nickel-bronze coins of 2s., 1s., 6d., 3d., 1d., and ½d. issued by the Board.

2. *Bank.*—The only Bank is a Branch of the Bank of British West Africa at Bathurst which has a savings bank for small depositors.

3. The Government has a Post Office Savings Bank, the rate of interest being 2½ per cent. per annum. At the 31st December, 1933, the amount due to depositors was £1,805, and the accounts numbered 805.

B.—PUBLIC FINANCE.

1. *Public Debt.*—The public debt of the Colony as at 31st December, 1933, amounted to £38,759 13s. 9d., representing the amount of stock issued in 1933 to produce the sum of £37,500 required to finance the carrying out of certain public works. The stock was issued at 97 per cent., bears interest at the rate of 3½ per cent. per annum and is redeemable at par in 1963. Provision for redemption is made by a sinking fund to which annual contributions are made at the rate of 1.9 per cent. per annum of the stock issued. The balance of this fund on 31st December, 1933, amounted to £643 12s. 6d.

2. (a) *Revenue (on basis of Estimates for 1934).**Self-balancing Department.*

						<i>Posts and Telegraphs.</i>
						£
Expenditure	...	...	...	...	...	4,630
Revenue	...	...	...	...	...	2,710
Deficit						1,920

	Revenue.	Expenditure.
		£
Colonial Development Fund Grants :—		
Government Wharf, Bathurst	2,500	2,500
Kombo Road	1,175	1,175
Bathurst Water Supply	85	85
Cattle Immunization Scheme	800	1,623
	<u>4,560</u>	<u>5,383</u>

General Revenue.						£	Percentage.
Customs, i.e. :—							
						£	
Import Duties						89,500	
Export						25,000	
						<u>114,500</u>	65·8
Direct Taxes						13,555	7·8
Fees, etc.						21,515	12·4
Licences, Port Dues, Rent, and Interest and Miscellaneous Revenue.						24,442	14·0
						<u>174,012</u>	<u>100</u>
Revenue of self-balancing Department set off against Expenditure.						2,710	
Receipts from the Colonial Development Fund						<u>4,560</u>	
Total ...						<u>£181,282</u>	

(b) Analysis of Import Duties for 1933.

Amount of duty collected on articles imported from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
Class I. ...	8,997	41,469	23,517	73,983
Class II. ...	36	—	198	234
Class III. ...	24,953	857	23,190	49,000
	<u>£33,986</u>	<u>42,326</u>	<u>46,905</u>	<u>123,217</u>
Parcel Post... ..				526
				<u>£123,743</u>

3. Expenditure (on basis of Estimates for 1934 excluding loan funds expenditure).

	£	Percentage.
(1) Deficit on self-balancing Department. (See 2(a)) ...	1,920	1·1
(2) Debt Charges	2,094	1·2
(3) Administration	86,721	50·5
(4) Economic Development	17,397	10·1
(5) Social Services	38,696	22·5
(6) Defence	9,756	5·7
(7) Pensions and Gratuities	15,100	8·9
	<u>171,684</u>	<u>100</u>
Expenditure of self-balancing Department set off against Revenue		
Colonial Development Fund expenditure		
	<u>2,710</u>	
	<u>15,383</u>	
Total ...	<u>£179,777</u>	

4. As at 31st December, 1933, the accumulated amount of the reserve funds was :—

	£
Reserve Fund	67,207
Steamer Depreciation Fund	13,898
	<u>£81,105</u>

The former is a general reserve, the sum of £50,000 having been set aside out of Revenue in 1927 and invested in certain securities, the interest on which is added to the Fund.

The latter Fund represents sums set aside from Revenue from time to time and invested in certain securities, the interest being also added to the Fund. The Fund is for the replacement of Government craft as and when required.

5. Grants have been authorized from the Colonial Development Fund as follows:—

(A) A grant of £12,500 to be utilised in conjunction with the Inter-Colonial loan of £37,500 for the carrying out of certain development works, viz. :—

- (i) Road communication between the Kombo country and the Port of Bathurst.
- (ii) Improvement of Bathurst Water Supply.
- (iii) Reconstruction of Government Wharf at Bathurst.

The first two works were completed in 1934 and the Wharf reconditioning will be finished in 1935.

(B) A grant, subject to a maximum of £3,200, not exceeding one half of the total expenditure in connection with the Cattle Immunization Scheme (vide V A(3) Animal Husbandry).

IV.—Trade Statistics.

EXPORTS.

(i) Total Exports (including Bullion and Specie) to:—

				United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
1913	...	...	...	62,393	55,039	749,755	867,187
1930	...	...	...	175,171	17,634	713,838	906,643
1931	...	...	...	20,185	4,350	505,337	529,872
1932	...	...	...	283,643	3,612	319,259	606,514
1933	...	...	...	175,467	6,333	333,408	515,208

(ii) Domestic Exports by Classes, 1933

To:—				Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	...	...	...	1	173,352	10	3	173,366
Rest of Empire	...	...	...	338	2,641	26	—	3,005
Total Empire	...	...	...	339	175,993	36	3	176,371
France	...	...	...	2	195,452	—	—	195,454
Holland	...	...	...	—	80,319	—	—	80,319
Germany	...	...	...	—	30,574	3	—	30,577
Denmark	...	...	...	—	15,570	—	—	15,570
Other foreign countries	...	...	...	36	7,996	4	—	8,036
Total foreign countries	...	...	...	38	329,911	7	—	329,956
GRAND TOTAL	...	...	...	377	505,904	43	3	506,327

(iii) Principal Domestic Exports, 1933.

Article.			Total Quantity.	Total Value. £	Principal countries of destination with amounts in £'000.
Class II.					
Groundnuts	...	...	67,370 tons.	500,766	France (195), United Kingdom (171), Holland (80)
Palm Kernels	...	...	615 tons.	4,199	United Kingdom (2), Germany (1).

IMPORTS.

(i) Total Imports (including Bullion and Specie) from:—

				United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
1913	...	...	...	387,424	94,445	609,260	1,091,129
1930	...	...	...	182,262	63,277	297,221	542,760
1931	...	...	...	94,615	36,171	121,827	252,613
1932	...	...	...	149,949	44,111	103,781	297,841
1933	...	...	...	229,868	72,631	147,369	449,868

(ii) Imports by Classes, 1933.

From:—				Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	...	...	...	23,625	2,683	187,865	—	214,173
Sierra Leone	...	...	...	32,968	2,340	375	—	35,683
India	...	...	...	23,551	—	9,843	—	33,394
Canada	...	...	...	1,591	—	1,236	—	2,827
Rest of Empire	...	...	...	634	27	66	—	727
Total Empire	...	...	...	82,369	5,050	199,385	—	286,804
France	...	...	...	24,619	1,075	25,019	—	50,713
Japan	...	...	...	24	—	27,677	—	27,601
United States of America	...	...	...	5,914	164	7,502	—	13,580
Germany	...	...	...	440	158	7,680	—	8,178
Belgium	...	...	...	282	—	6,637	—	6,919
Holland	...	...	...	632	3	3,492	—	4,127
Other foreign countries	...	...	...	14,677	564	17,481	—	32,722
Total foreign countries	...	...	...	46,588	1,964	95,288	—	143,840
Parcel Post	...	...	...	—	—	—	5,258	5,258
GRAND TOTAL	...	...	...	128,957	7,014	294,673	5,258	435,902

(iii) *Principal Imports, 1933.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of origin, with amounts in £'000.</i>
<i>Class I.</i>			
Kola Nuts	17,962 cwt.	31,659	Sierra Leone (31).
Rice	4,206 tons	30,031	India (23).
Sugar	858 „	14,602	France (14).
Tobacco—			
Cigarettes	26,683 lb.	6,300	United Kingdom (6).
Unmanufactured	148,676 „	5,672	United States of America (5).
Other kinds	293 „	86	
	175,652 „	12,058	
Flour, wheaten	13,943 cwt.	7,024	United Kingdom (3), France (2), Canada (1).
Edible Oils	54,052 gal.	6,426	United Kingdom (4).
<i>Class III.</i>			
Cotton Manufactures—			
Piece Goods—			
Printed	2,568,841 sq. yd.	49,249	United Kingdom (33), Japan (9).
Bleached, plain weave	2,033,077 „	31,064	United Kingdom (25).
Dyed in the piece	1,237,056 „	25,322	United Kingdom (21).
Grey	736,385 „	10,524	United Kingdom (7).
Other kinds	900,669 „	19,242	United Kingdom (16).
Yarn	237,507 lb.	16,195	United Kingdom (13).
Other kinds	—	22,774	United Kingdom (13).
		174,370	
Apparel	—	15,872	United Kingdom (9), Japan (5).
Iron and Steel Manufactures, unenumerated.	—	12,396	United Kingdom (9).
Bags and Sacks	402,941	11,335	India (9).
Oils	210,400 gal.	11,126	United States of America (5).
Soap (all kinds)	6,522 cwt.	7,107	France (5), United Kingdom (2).
Hats and Caps	—	6,724	France (3), Germany (2), United Kingdom (1).
Patent Fuel	1,700 tons	4,455	United Kingdom (all).
Boots and Shoes	51,641 pr.	4,088	Japan (2), Morocco (1).

V.—*Natural Resources.*

A.

1. *AGRICULTURE.*

Most of the population, as stated under Section II, is engaged in agricultural production. The predominant export crop is the groundnut, but rice, maize, guinea corn, cassava, sweet potatoes, and other food crops are also largely cultivated for local consumption. Cotton is grown to a certain extent, particularly in the North Bank Province, and is used for the local manufacture of cloth.

Groundnuts represent in value over 95 per cent. of the total exports. Quantities and values exported in recent years have been:—

	<i>Tons.</i>	<i>£</i>		<i>Tons.</i>	<i>£</i>
1929 ...	56,355	765,564	1932 ...	37,315	391,659
1930 ...	74,761	867,634	1933 ...	67,370	500,766
1931 ...	66,811	506,125			

The production is entirely in native hands. Approximately 98,500 persons are annually engaged in the cultivation of groundnuts. Two experimental farms are maintained by Government and a system of produce inspection for exported groundnuts is provided for maintaining a standard of quality for exports.

There is also a small export of palm kernels; 615 tons, valued at £4,199, in 1933.

2. *FOREST PRODUCTS.*

There is no forest country and apart from rhun palms, which are extensively used in the construction of native houses, wharves, etc., all timber has to be imported.

3. *ANIMAL HUSBANDRY.*

There is no organized animal industry in the Gambia, although it is estimated that there are usually about 35,000 head of cattle in the Colony and Protectorate. The river valley, although swampy and tsetse-infested, offers good grazing and there is a continual movement of cattle from and to the extensive neighbouring French territories, which act as a reservoir of cattle for the Gambia. Effective control of this movement is impossible owing to the length of the border. During 1933, 1,900 head of cattle are reported to have died of rinderpest, but it is not known how many of these could be regarded as belonging to the Gambia. The herds are generally composed of cattle belonging to a number of owners who leave them in charge of a single herdsman.

The cattle products are practically all consumed locally, but there is a small export of hides and skins (£185 in 1933). The industry is, however, capable of expansion if the number of cattle can be increased by the control of rinderpest.

A scheme for the immunization of cattle was approved in 1933. This scheme is being financed partly from Revenue and partly from a grant from the Colonial Development Fund not exceeding one half of the total expenditure. The grant in respect of the years 1935-38 is subject to a maximum of £600 in each year.

The scheme, which was started in October, 1933, will be spread over a period of five years. As the resistance of cattle to disease appears to be greater during the dry season than during the rains, immunization work will be attempted only during the former period of the year when the best results may be expected. Each period of operations will extend, therefore, from November to April.

The results of the 1933-34 season may be considered very satisfactory, though progress was somewhat slower than anticipated and activities were confined mainly to the South Bank Province. Altogether 1,146 cattle were immunized, the method of immunization employed being that of double inoculation with locally-made serum and live virus, which confers life-long immunity. The inoculations were attended by a mortality of 3.2 per cent., a lower figure than that expected and one which compares very favourably with results obtained elsewhere in Africa. At the outset the cattle-owners in parts of the South Bank Province were unwilling to allow their herds to be treated, but the results of the inoculations produced a very favourable impression. This impression was further strengthened by the fact that during several outbreaks of rinderpest, which occurred subsequently, none of the immunized cattle was affected by the disease. Although the number of inoculations fell short of the anticipated total the confidence of the cattle-owners was gained to a degree which augurs well for the future success of the scheme. The Veterinary Officer was able to make only two brief visits to MacCarthy Island Province where he inoculated 70 head of cattle with satisfactory results. The cattle-owners in this Province displayed great interest in the scheme and appeared to be favourably disposed towards the inoculation of their herds.

Donkeys are used extensively for the transportation of groundnuts and other crops whilst a considerable number of sheep, goats and pigs are reared for local consumption. At the end of 1933 there were approximately 14,000 donkeys and 90,000 sheep and goats in the Gambia.

4. MINERALS.

There are no mineral resources in the Gambia.

5. FISHERIES.

The sea fishing industry is capable of expansion. The native of the Gambia, however, takes little or no part in this industry which is almost entirely in the hands of Senegalese natives.

B.

FOOD SUPPLY.

Apart from St. Mary's Island (including the town of Bathurst) the Gambia may be said to be self-supporting with respect to foodstuffs in that practically all essential articles of diet can be raised locally. In former years a considerable amount of rice was imported into the country, but during the last year or so the importation of this commodity has decreased to a considerable extent. The people are now encouraged by Government to grow an adequate supply of foodstuffs in addition to the export crop of groundnuts. The European articles of food imported into the Protectorate may be regarded as luxuries to the bulk of the population; the same remark applies to kola nuts, which are imported from Sierra Leone.

In Bathurst the position is different. St. Mary's Island is too small in area to permit of farming, whilst many of the inhabitants, particularly those belonging to the educated and wealthier classes, have acquired a taste for European articles of food. Such foodstuffs now form a considerable proportion of the diet of these classes.

Head IV (Table iv) shows the principal requirements in all imports and also the countries whence they are imported.

VI.—Industry.

There are no important industries in the Colony.

VII.—Other Economic Activities.

The entrepôt trade and the tourist traffic are of little or no importance.

VIII.—Communications.

Harbour.—There is one harbour which is situated at Bathurst and is controlled and maintained by the Marine Department. In conjunction with the harbour, Government maintains a wharf, whilst all the leading firms have wharves opposite their trading establishments. The approach channel to the harbour is marked by a light vessel and buoys. The dimensions, etc., of the harbour are as follows:—

Minimum width at entrance, 1½ miles.

Minimum navigable depth, L.W.O.S.T., at entrance, 5 fathoms.

Maximum available depth of water at wharves L.W.O.S.T., 11-20 feet.

The number of sailing and steam vessels which entered the harbour during 1933 was 211 with a total net tonnage of 508,235. Of the 199 steam vessels which entered the harbour, 82 were British with a net tonnage of 288,074.

The Marine Department slipway and engineering works are fitted with modern machines capable of carrying out all repairs and refits to vessels of up to 400 tons gross.

External Communications.—For mail services the Colony is almost entirely dependent upon the ships of Messrs. Elder Dempster Lines, Limited. There is a monthly service, but otherwise the mail steamers are irregular. The intermediate ships call outwards and homewards once in about every six weeks.

Internal Communications.—River Transport.—The Gambia River is navigable for ocean-going vessels as far as Kuntau-ur (150 miles from Bathurst) and for vessels drawing less than two fathoms as far as Koina (292 miles).

During the trading season, groundnuts are brought down the river in ocean-going vessels, steamers, and lighters and also in cutters and schooners, though the latter have now been almost entirely replaced by steam craft.

Roads.—There are four trunk roads:—

No. 1.—Bathurst to Brumen Ferry (90½ miles).

No. 2. Barra to Illiassa (62 miles).

No. 3. Illiassa to Brumen Ferry (22½ miles) with a branch eastwards from Jattaba to Sandeng and the French boundary (2½ miles).

No. 4. Bantanding on Road No. 2 to the French boundary (¼ mile).

In addition there is a secondary road running from Illiassa to Bansang Ferry where it connects with the secondary road on the South Bank running from Kwinella to Fattoto.

There are also a number of secondary feeder-roads to the various river ports in the Protectorate.

The total mileages of secondary and feeder-roads in each Province are approximately as follows:—

	Miles.
North Bank Province	116
South Bank Province	95
MacCarthy Island Province	280
Upper River Province	200

River Services.—A regular passenger and cargo service is maintained by the Government steamers *Prince of Wales* (400 tons) and *Lady Denham* (260 tons).

The steamers call at 26 ports outward and homeward when proceeding to Basse, a distance of 242 miles from Bathurst, and 31 ports when calling at Fattoto, a distance of 288 miles from Bathurst.

This service ensures communication with all ports in the Protectorate twice weekly during the trade season from November to May. During the remaining months of the year, a fortnightly or monthly service is maintained.

Ferries.—Passenger and vehicular ferries have been installed by Government in connexion with the road system at a number of points.

There are no rail or air communications in the Gambia.

IX.—Tariff.

Duties at either special or *ad valorem* rates are levied on all imports, except certain goods exempted for special reasons. A rate of 10 per cent. preferential, and 12½ per cent. general, is chargeable on most articles subject to *ad valorem* duty, but a few articles, limited in number, are chargeable at 15 per cent. preferential, 20 per cent. general, and a few at 5 per cent. preferential, 25 per cent. general.

X.—Trade Representatives.

The Gambia has no official Trade Representative abroad. The Receiver-General is the local Imperial Trade Correspondent.

GOLD COAST.

I.—Situation, etc.

The Gold Coast comprises the Gold Coast Colony, its dependencies Ashanti and the Northern Territories, and Togoland under British Mandate. It is situated on the Gulf of Guinea and lies between longitude 1° 14' E. and 3° 7' W., and between latitude 4° 45' and 11° 10' N. On the west, north, and east it is bounded by French territory and on the south by the sea.

The area of the Colony is 23,937 square miles; of Ashanti, 24,379; of the Northern Territories, 30,486; and of Togoland under British Mandate, 13,041; the total being 91,843 square miles.

The Gold Coast may be divided generally into three belts. In the centre is the forest area; the south-eastern corner consists of rolling plains covered with scrub and grass; and the north is largely "orchard" country. The forest area consists of low hills and is traversed in a north-westerly direction by a well-marked range varying in height from 1,000 to 2,000 feet. The country is plentifully intersected by rivers, streams, and watercourses, but the rivers are not navigable by vessels other than canoes, except in the lower reaches where launches can operate under certain conditions.

The climate of the forest area is typically hot and damp. The temperature ranges round 80°, and there is little variation. The rainfall varies considerably but on the average may be said to be from 60 to 70 inches per annum. The dry season extends from December to February, and there is a break in the rains in August. June and September are the wettest months. Tornadoes may be expected in March and October. In the north the rains are of less duration and reach their highest intensity in September. The average temperature is higher than on the coast and the climate is generally drier. On the plains in the south-east the seasons are not well-defined and the rainfall is low. During the months of January and February the whole country is visited

by the Harmattan, a dry, dusty wind from the Sahara, the duration and intensity of which are much greater in the north than in the south. When this wind is blowing, the daily variation in temperature is greatly increased, and comparatively low temperatures are registered at nights in the north while the maximum shade temperature during the day may rise to 105°.

The following table shows the most significant figures for 1933, at the stations shown:—

Station.	Height above sea level. Feet.	Monthly Maximum.		Monthly Minimum.		Rainfall. Inches.
		Highest. Fahr.	Lowest. Fahr.	Highest. Fahr.	Lowest. Fahr.	
Accra (Colony) ...	45	93° May	85° Sept.	74° April	63° Dec.	35·51
Kumasi (Ashanti) ...	840	98° June	88° Aug.— Sept.	69° April	53° Jan.	54·45
Axim (Colony) ...	20	93° March— April.	88° June	72° April	60° Jan.	90·76
Tamale (Northern Territory)	660	106° Feb.— March.	91·8° Aug.	68° April— May.	57° Dec.	50·22

The fundamental principle underlying the ownership of land in the Gold Coast is that the land belongs to the community. In recent years, however, the practice of disposing of freehold rights to private individuals, which is contrary to native custom, has arisen. Such alienations are on the increase and are the cause of considerable trouble in the constitution of Forest Reserves.

Crown land consists of the land at Kumasi annexed at the conclusion of the Ashanti war of 1900, land obtained for the harbour and township of Takoradi and land acquired from time to time for public purposes under the Public Lands Ordinance of the Colony and under the Administration Ordinances of Ashanti and the Northern Territories. Land required for railway purposes is acquired under the Railway Ordinance. The total area of land owned by Government in the Gold Coast is 171 square miles only. The Land and Native Rights Ordinance, 1931, of the Northern Territories vests all native lands in the Protectorate in the Governor to be held and administered for the benefit of the natives; but mining leases are regulated by the Mineral Rights Ordinance. The area alienated in the Protectorate for mining purposes is two square miles. In the Colony and Ashanti the leasing of land by the chiefs for mining, agricultural and arboricultural purposes is regulated by the Concessions Ordinances, and the land so alienated amounts to 7,155 square miles in the Colony and 1,033 square miles in Ashanti.

II.—Population, etc.

At the census of 1931 the population of the Gold Coast was—

Gold Coast Colony ...	1,573,770
Ashanti ...	578,702
Northern Territories ...	717,382
Togoland under British Mandate ...	293,714
Total ...	3,163,568

The total included 3,182 non-Africans, chiefly Europeans. It is estimated that the population had increased to 3,357,950 at the middle of 1933.

The majority of the inhabitants of the Gold Coast are peasant farmers. The most important crops cultivated are cocoa for export and foodstuffs for local consumption, but a number of other agricultural products receive attention. In the large towns there is an abundance of African skilled labour and fishing is a common industry all along the coast. The educated classes are employed largely in the Government Service, by the mercantile houses, and in the teaching profession. Petty trading is the peculiar occupation of the women.

The principal towns, with their populations in 1931, are Accra, the capital (60,726); Sekondi, in the Western Province of the Colony (16,953); Cape Coast, in the Central Province (17,685); Kumasi the chief town of Ashanti (35,829); and Tamale, Northern Territories (12,941).

Immigration is mostly from the north, numbers of foreign unskilled labourers coming into the country every year in the hope of securing employment. Traders from the north regularly come down with cattle for sale and return to their homes with kola nuts for disposal there.

Generally speaking, owing to the stricter conditions prevailing in the adjoining French Colonies, there is a tendency for individuals, families and even tribes to attempt to cross the frontiers and settle in the Gold Coast. The Gold Coast native sees small attraction in wandering far afield and consequently there is little real emigration.

III.—Finance.

A. CURRENCY AND BANKING.

The unit of currency is the pound, maintained at par with sterling by the West African Currency Board which issues and redeems currency in the four British West African Colonies against deposits and withdrawals of sterling in London. The media of circulation consist of £1 and 10s. notes and alloy and nickel-bronze coins of 2s., 1s., 6d., 3d., 1d., $\frac{1}{2}$ d., and $\frac{1}{4}$ d. issued by the Board.

The Bank of British West Africa, Limited, and Barclays Bank (Dominion, Colonial and Overseas), Limited, with head offices in London, have 11 and 7 branches respectively in the Gold Coast.

A Government Post Office Savings Bank has been in operation since the 1st January, 1888. The number of depositors on the 31st December, 1933, was 18,077, and the amount on deposit was £114,955. Interest payable on deposits is at the rate of 2½ per cent. per annum.

There are 415 co-operative societies in the Gold Coast established under the Co-operative Societies Ordinance No. 4 of 1931. The number of members on the 31st March, 1934, was 8,828, and the total share capital £7,200.

B.—PUBLIC FINANCE.

1. Public Debt.

(a) The total public debt as at the 31st March, 1934, was £12,961,000.

(b) The annual amount required for
(i) interest is £611,300 and for
(ii) sinking fund £114,610.

(c) The total value of the sinking funds was £2,250,155 at the 31st March, 1934, and in addition there is a sum of £235,037 invested as a Supplementary Sinking Fund and available in case of need, either for loan amortization or for other Government purposes.

The following table gives details regarding each particular loan:—

Date Raised.	Public Debt Amount of issue. £	Annual Rate Per cent.		Date. of Redemption.	Total Amount of accumulated Sinking Fund on 31st March, 1934. £
		Interest.	Sinking Fund.		
1898 and 1900	1,035,000	3	1	1927-52	741,658
1902 ... }	63,000	3	1	1927-52	
1908 ... }	1,030,000	3½	1	1934-59	458,844
1910 ... }	1,035,000	4	1	1939-59	315,521
1919 ... }	4,000,000	6	½	1945-70	400,878
1925 ... }	4,628,000	4½	1	1956	333,254
1931 ... }	1,170,000	4½	1	1960-70	(begins 15th October, 1934.)
	12,961,000				2,250,155

2.—(A) Analysis of Revenue (on the basis of the Estimates for 1934-35).

Self-balancing Departments.

	Revenue. £	Expenditure. £
Railway* ...	747,025	879,662
Takoradi Harbour* ...	111,300	178,812
Posts and Telegraphs ...	100,000	142,299
Waterworks ...	17,600	21,800
Electric Light... ...	25,600	16,400
Transport Department ...	18,000	20,679
	1,019,525	1,259,652

Net deficit £240,127.

Colonial Development Fund.

Grants—	Revenue. £	Expenditure. £
Colonial Veterinary Scholarship Scheme ...	34	34
Colonial Agricultural Scholarship Scheme ...	308	308
	342	342

General Revenue.

	Annual. £	Percentage.
(1) Customs ...	1,682,660	72·7
(2) Licences, etc. ...	210,700	9·1
(3) Fees of Court ...	127,593	5·5
(4) Rents, Interest, Harbour, etc., Dues and Miscellaneous (including Salary levy).	294,340	12·7
	2,315,293	100·0
Revenue of self-balancing Departments (excluding Railway and Takoradi Harbour) set off against expenditure.	161,200	
Receipts from Colonial Development Fund ...	342	
	£2,476,835	

* Includes proportion of public debt charges—viz., £471,325 Railway and £153,395 Harbour.

(B) *Analysis of Import Duties for 1933.**Amount of duty collected on articles imported from:—*

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
Class I	306,451	7,009	365,833	679,293
Class II	1,787	31	589	2,407
Class III	303,312	35,650	443,329	782,291
Class V	6	—	21	27
	£611,556	42,690	809,772	1,464,018
Duty collected on goods sold from Government Stores, 1933				3,289
				1,467,307

3. *Expenditure on the basis of the Estimates for 1934-5.*

	Annual. £	Percentage.
(1) Self-balancing Departments net deficit	240,127	10.4
(2) Debt Charges (excluding Railway and Takoradi Harbour)	100,578	4.3
(3) Administration	780,330	33.6
(4) Economic Development	266,935	11.6
(5) Social Services	598,995	25.8
(6) Defence	91,265	3.9
(7) Pensions	242,075	10.4
	2,320,305	100.0
Expenditure of self-balancing Departments (excluding Railway and Takoradi Harbour) set off against Revenue	161,200	
Colonial Development Fund	342	
	£2,481,847	

4. *Reserve Funds, etc.*

The Reserve Fund on the 31st March, 1934, amounted to £1,301,476 invested as to £1,168,736 in British funds, and £132,741 in cash loaned to the Joint Colonial Fund.

The surplus of assets over liabilities on the 31st March, 1934, amounted to £622,493.

Not included in the Reserve Fund or in the Statement of Assets and Liabilities is a sum of £235,037, fully invested in British Funds, set aside as a Supplementary Sinking Fund.

The Railway Renewals Fund on the 31st March, 1934, amounted to £537,177 in respect of which the value of investments in British Funds amounted to £453,515 at that date.

The balances of the advances to municipalities for various municipal works and buildings amounted to £65,766 on the 31st March, 1934. These are interest-bearing loans repayable by annual instalments.

5. *Grants-in-aid etc.*

No grants-in-aid or loans-in-aid have been received from the Imperial Government in recent years. Free grants and loans on repayment from the Colonial Development Fund had been received by the end of 1934, as under:—

	Amount of Grant or Loan. £	Estimated Total Cost. £
(a) Free grant towards construction of veterinary laboratory in the Northern Territories	20,000	27,447
(b) Free grant of interest for 2 years on the capital cost of Accra Waterworks Extension (Weijsa Main)	3,513	—
(c) Annual grant to supplement annual contribution to the Colonial Veterinary Scholarship Fund—1933-34 grant	54	—
(d) Free grant for one year towards cost of training an officer in forest utilization—1933-34	555	—
(e) Loans repayable by annual instalments:—		
(1) Tamale Water Supply	39,885	40,000
(2) Cape Coast Electricity Supply	25,452	25,180

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom. £	Rest of of Empire. £	Foreign Countries. £	Grand Total. £
1913	3,514,873	402,559	1,509,673	5,427,105
1930	4,386,843	428,324	6,472,221	11,287,388
1931	4,477,289	198,724	4,624,492	9,300,505*
1932	3,431,199	136,870	4,324,450	7,892,519*
1933	3,640,146	221,193	4,186,921	8,048,260*

* Excludes value of Ships' Stores as follows:—

	£
1931	115
1932	386
1933	224

(ii) *Domestic Exports by Classes, 1933.*

	Class I.	Class II.	Class III.	Class IV.	Class V.	Total Merchandise.
	£	£	£	£	£	£
To:—						
United Kingdom	1,047,894	628,347	1,303	2	1,841,883	3,519,429
Canada	38,378	46,559	3	—	—	84,940
Australia	77,855	—	6	—	—	77,861
Rest of Empire	16,814	1,306	1,105	703	—	19,930
<i>Total Empire</i>	1,180,941	676,212	2,419	705	1,841,883	3,702,160
Germany	1,485,169	25,803	64	—	—	1,511,036
United States of America	1,249,529	57,519	13	—	—	1,307,061
Holland	601,238	5,665	3	—	—	606,906
France	51,226	84,230	3	—	—	135,459
Norway	19,674	95,456	—	—	—	115,130
Italy	109,185	4,869	—	—	—	114,054
French Togoland	89,111	4,168	2,643	—	—	95,922
Other Foreign Countries	188,492	22,982	659	—	—	212,133
<i>Total Foreign Countries</i>	3,793,624	300,692	3,385	—	—	4,097,701
High seas	—	—	2	—	—	2
GRAND TOTAL	4,974,565	976,904	5,806	705	1,841,883	7,799,863

(iii) *Principal Domestic Exports, 1933.*

	Article.		Quantity.	Total Value.	Principal Countries of destination with
Class I—				£	amounts in £'000.
Cocoa ...	...	...	236,117 tons	4,971,478	Germany (1,484), United States of America (1,250), United Kingdom (1,047), Holland (601), Italy (109), French Togoland (88), Australia (78), Poland (67), France (51), Sweden (47), Canada (38), Belgium (38), Denmark (35).
Class II—					
Diamonds ...	...	...	803,985 carats	518,400	United Kingdom (all).
Manganese ore	...	...	265,140 tons	357,366	Norway (95), France (83), United Kingdom (55), United States of America (52), Canada (47).
Mahogany	...	...	209,902 cub. ft.	25,270	United Kingdom (21), United States of America (2).
Palm Kernels	...	...	3,013 tons	23,240	Germany (15), United Kingdom (5).
Copra ...	...	...	1,138 tons	11,434	Germany (5), United Kingdom (3), Italy (2).
Class V—					
Raw Gold	...	...	294,373 fine oz.	1,841,883	United Kingdom (all).

IMPORTS.

Imports in these returns are classified as received from the country of consignment, which is the country where the goods were last owned and from which they were procured by the importer. It is not necessarily, therefore, the country of origin. Since the 1st of January, 1934, imports have been classified by country of origin.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	3,466,351	285,098	1,201,045	4,952,494
1930	4,395,108	296,384	4,261,828	8,953,770
1931	2,512,260	196,980	2,094,634	4,803,874
1932	3,273,593	226,684	2,104,942	5,605,219
1933	3,063,438	278,535	2,201,381	5,543,354

(ii) *Imports by Classes, 1933.*

Country of Consignment.	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom	520,060	41,592	2,263,268	20	2,824,940
Nigeria	49,635	34,931	47,706	564	132,836
India	40,879	—	91,737	—	132,616
Rest of Empire	7,937	16	5,130	—	13,083
<i>Total Empire</i>	618,511	76,539	2,407,841	584	3,103,475
United States of America	207,832	1,034	440,913	—	649,779
Germany	124,759	999	305,289	—	431,047
Holland	82,603	236	172,181	—	255,020
Japan	45	8	166,637	—	166,690
Other Foreign Countries	195,347	5,101	289,766	1	490,215
<i>Total Foreign Countries</i>	610,586	7,378	1,374,786	1	1,992,751
GRAND TOTAL	1,229,097	83,917	3,782,627	585	5,096,226

In addition there were imports of bullion and specie from the United Kingdom to the value of £238,498 and from foreign countries to the value of £208,630.

(iii) *Principal Imports, 1933.*

<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i> £	<i>Principal Countries of Consignment with amounts in £'000.</i>
<i>Class I—</i>			
<i>Tobacco—</i>			
Unmanufactured	1,502,214 lb.	68,283	United States of America (67).
Cigarettes	403,013 „	236,557	United Kingdom (236).
Cigars	2,436 „	1,448	
Other kinds	7,196 „	2,766	United Kingdom (2)
	1,914,859 „	309,054	
Flour, Wheaten	174,252 cwt.	127,566	United States of America (112), United Kingdom (8), Canada (7).
Rice	217,686 „	117,097	India (41), Germany (37), Holland (21), United Kingdom (10), France (8).
<i>Meats—</i>			
Beef and Pork, pickled ...	37,047 cwt.	41,993	Germany (18), Denmark (15), United Kingdom (6).
Canned and bottled	21,361 „	54,612	Argentina (32), Holland (12), United Kingdom (8).
Fresh	2,824 „	15,420	United Kingdom (15).
Smoked and cured	641 „	1,745	United Kingdom (1).
Other kinds including extracts	10 „	308	United Kingdom (all).
	61,883 „	114,078	
<i>Fish—</i>			
Canned, etc.	24,196 „	55,946	United States of America (22), Portugal (16), Holland (7).
Dried, salted, etc.	44,270 „	50,233	Canary Islands (37), French Togoland (6).
Fresh	449 „	2,257	United Kingdom (2).
	68,915 „	108,436	
<i>Spirits—</i>			
Brandy	1,790 gal.	2,461	France (2).
Gin	69,451 „	31,684	Holland (25), United Kingdom (6).
Rum	13,182 „	5,880	United Kingdom (5).
Whisky	32,781 „	37,591	United Kingdom (all).
Cordials and Liqueurs ...	314 „	594	
Unenumerated	1,347 „	3,698	Germany (1), United States of America (1).
	118,865 „	81,908	
Sugar	4,243 tons	72,682	United Kingdom (39), Germany (26).
Salt (other than table) ...	152,243 cwt.	31,220	United Kingdom (16), Spain (10).
<i>Class II—</i>			
Coal	26,888 tons	43,803	Nigeria (34), United Kingdom (9).
<i>Class III—</i>			
<i>Cotton manufactures—</i>			
<i>Piece Goods—</i>			
Bleached	4,039,990 sq. yds.	71,429	United Kingdom (49), Germany (10) Japan (8)
Dyed in the piece	6,568,498 „	166,715	United Kingdom (139), Nigeria (16).
Coloured Cottons	3,536,685 „	72,923	United Kingdom (51), Japan (11), Nigeria (7).
Grey	2,416,068 „	29,859	United Kingdom (17), Germany (7), Japan (5).
Printed	25,890,931 „	683,762	United Kingdom (500), Holland (116), Germany (47), Switzerland (16).
Velveteen	164,154 „	10,641	
Other kinds including sewing yarn, fents, towels, etc.	—	100,151	United Kingdom (71), Japan (8), Holland (7), Germany (5).
		1,135,480	
<i>Oils—</i>			
Illuminating	1,824,461 gal.	91,469	United States of America (72), Portugal (13).
Motor Spirit	4,213,729 „	218,551	United States of America (203), Portugal (7), Dutch West Indies (6).
Lubricating	392,358 „	40,186	United States of America (22), United Kingdom (15).
Fuel	944,887 „	13,101	Dutch West Indies (11).
Other kinds	10,045 „	9,889	United Kingdom (7), Germany (2).
	7,385,480 „	373,196	
<i>Iron and Steel Manufactures—</i>			
Corrugated Iron Sheets ...	5,909 tons	92,410	United Kingdom (90), French Togoland (1).
Other kinds	—	205,681	United Kingdom (107), Germany (58), Czechoslovakia (15), Belgium (9), Holland (6), United States of America (4), Japan (2).
		298,091	

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of Consignment with amounts in £'000.</i>
<i>Class III—(contd.).</i>		£	
<i>Machinery—</i>			
Mining and Gold Dredging ...		154,767	United Kingdom (141), United States of America (5), Germany (5), Holland (4).
Electrical		25,477	United Kingdom (25).
Industrial		12,467	United Kingdom (10), Germany (1).
Other kinds		21,006	United Kingdom (18), Holland (2).
		213,717	
<i>Artificial Silk Manufactures—</i>			
Piece Goods	2,307,813 sq. yd.	110,832	United Kingdom (49), Japan (28), Germany (19), Czecho-Slovakia (7).
Other kinds		52,333	United Kingdom (31), Japan (7), Germany (5), Italy (4).
		163,165	
<i>Motor Cars etc., and parts—</i>			
Motor-cars	886	96,574	United States of America (54), United Kingdom (40).
Motor-car parts		53,985	United States of America (36), United Kingdom (14), Germany (2).
		150,559	
Bags and Sacks	5,099,904	147,451	India (91), United Kingdom (44).
Apparel		90,591	United Kingdom (58), Japan (27).
<i>Rubber Manufactures—</i>			
Tyres for Vehicles		78,854	United Kingdom (40), United States of America (25), France (13).
Other kinds		3,161	United Kingdom (2).
		82,015	
Soap (all kinds)	63,309 cwt.	77,070	United Kingdom (62), Holland (6).
Medicines and Drugs		76,782	United Kingdom (60), United States of America (6), France (5), Germany (5).
Cement	22,558 tons	56,841	United Kingdom (29), Jugo-Slavia (10), Belgium (6), Germany (5).

V.—Natural Resources.**A.****1. AGRICULTURE.**

Cocoa.—The most important product of the Gold Coast is cocoa, which is grown almost exclusively by peasant farmers. Its cultivation is the chief agricultural industry in the Colony, Ashanti and Southern Togoland; but cocoa does not thrive in the Northern Territories. The plantations extend throughout the forest area, where areas of forest have been cleared for the cultivation of foodstuffs which have been interplanted with cocoa, but it is difficult to estimate with any degree of accuracy the actual acreage under this crop. The older "farms" are in the east and it is in the west that new production is most noticeable. The average yield is estimated at 5 cwt. of dried cocoa per acre, and after making due allowance for "new areas" not yet in full bearing it is concluded that an acreage slightly in excess of 925,000 acres is under cocoa cultivation. From details secured in surveys by the Department of Agriculture it appears that the cultivations in the Western Province of Ashanti range between 2·8 and 6·4 acres and average 4·6 acres per holding. August to January constitutes the main cocoa season, and during those months the great bulk of the crop is harvested; but a smaller quantity averaging about 14 per cent. of the total annual crop is gathered in May and June and is termed the mid-season or minor crop. The crop year is normally reckoned from October to September.

Cocoa is grown for export. The beans are extracted from the pods by hand, allowed to ferment and then are dried in the sun. The actual farm receives little attention beyond weeding and elementary precautions against disease. Labour is usually supplied by the owner's own family, but paid labour is sometimes employed. The result is that the cost of production is low, even if the quality is not high. Considerable improvements in the quality have taken place in recent years, but great efforts are being made to raise the standard of quality still further. The prices realized have not as yet increased in accordance with the improvement in quality and the cultivator is as a consequence naturally loath to adopt measures which merely involve him in increased expenditure with insufficient return for the additional labour and trouble involved.

In recent years the efforts of the Government to foster the industry have been directed along three main lines, viz., (i) agricultural education; (ii) inspection and prescription of standards for export; and (iii) the formation of co-operative marketing societies. These measures are meeting with considerable success and the results so far secured indicate that considerable improvements in quality are being effected by the co-operative societies. The pests and diseases of cocoa have also received attention and instruction in regard to control measures is provided through the agricultural officers.

The whole of the crop is sold to local buyers, and the cost of transport to the buying centres and thence to the coast for shipment is an important factor in the price paid. The beans are packed in standard bags containing about 140 lb. The buyer may ship or hold according to the state of the market overseas, but no difficulty has yet been experienced by the farmer in disposing of his crop. The price he receives for it depends on the distance from the coast, competition amongst buyers, and the ruling prices in Europe and America. The big European firms established in the country are prominent buyers, but there is always a number of individual independent buyers in addition.

The amount of cocoa exported during recent years was as follows:—

	<i>Tons.</i>	<i>Value.</i> £		<i>Tons.</i>	<i>Value.</i> £
1929	238,068	9,704,493	1932	233,745	5,511,360
1930	190,580	6,970,385	1933	236,117	4,971,478
1931	244,097	5,493,165			

As the end of the calendar year comes in the middle of the main exporting season these figures do not accurately represent the variations of the crop from year to year. The exports during the crop year 1932-33 were 250,511 tons, which constituted a record. The exports during the crop year 1933-34 were about 220,900 tons, of which about 18,000 tons were the "mid crop" and the remainder the "main crop".

In 1933 the bulk of the crop was consigned to Germany (70,437 tons); United States of America (57,039 tons); United Kingdom (49,737 tons); and Holland (29,412 tons). French Togoland took 5,435 tons; Italy 5,397 and Poland 3,130. Of the Dominions Australia took 3,885 tons, Canada 1,778 and New Zealand and South Africa about 500 tons each.

The Gold Coast produces nearly half the world's supply of cocoa. The quantity exported may be taken to be the quantity produced and that has tended to fluctuate during the last few years rather than steadily to increase, the inference being that, although the 1932-33 crop reached a new high level, production under existing conditions is approaching its maximum. Increased planting in the west is offset by a reduction in yield in the east, and there is little doubt that the prevailing low prices discourage new planting in remote districts. Further particulars regarding cocoa generally will be found in the memorandum on pages of this volume.

Kola.—The cultivation of cocoa involves the clearing of forest lands and planting, but the kola industry of the Gold Coast is based on wild trees. Kola is an indigenous tree in two main areas in the forest belt, and the only labour involved is in the collection of the nuts, which is usually done for wages in kind, viz., food and a share of the nuts. The crop is mostly exported, although there is a certain amount of local consumption in the Northern Territories. It is either sold *in situ* to itinerant traders for export across the northern frontiers or transported to the coast for shipment to Nigeria.

The overland export is difficult to gauge accurately. An export duty on kola exported from Ashanti and the Northern Territories was imposed in 1931, and the following amounts have been collected:—

	£
1931	1,065
1932	6,219
1933	8,561

It is probable, however, that a larger quantity actually crossed the frontiers owing to the lack of facilities for safeguarding the revenue. The cost of adequate measures would be out of all proportion to the result.

The maritime exports have steadily fallen in the last four years, as the following table shows:—

	<i>Tons.</i>		<i>Tons.</i>
1929	3,056	1932	355
1930	3,768	1933	249
1931	1,318		

The fall is due to increased production in Sierra Leone and Nigeria and also to the alleged inferior taste of the Gold Coast nut.

Oil Palm Products.—The oil palm is indigenous and is found wild throughout the forest area. Its fruits are largely used for local consumption. The peak of the export trade was in the year 1884, when 20,134 tons of oil and 38,702 tons of kernels left the country. Since then it has steadily declined on account of the superior attractions of cocoa and the low price of oil. Two crushing mills have been erected for operation under European management, but one has had to close down owing to economic conditions.

The export of oil and kernels in the last five years is given in the following table:—

<i>Oil.</i>				<i>Kernels.</i>			
	<i>Tons.</i>	<i>Value.</i> £			<i>Tons.</i>	<i>Value.</i> £	
1929	596	16,830		6,569	96,447		
1930	489	11,392		5,470	69,018		
1931	320	4,749		4,035	37,204		
1932	702	10,688		6,999	60,283		
1933	17	179		3,013	23,240		

Steps have recently been taken with a view to safeguarding the principal oil-palm belts in the Gold Coast.

Copra.—The coconut palm is common all along the Coast in varying intensity, but the export of copra is small, being in the neighbourhood of 1,200 tons per annum. Efforts are now being made to expand the industry, but with a view to reducing imports rather than stimulating exports. It is reported that fairly considerable areas are suitable for the cultivation of coconuts. Standards for export have now been prescribed.

Food Crops.—There is a very large production of foodstuffs for local consumption throughout the country. The crops include yam, cassava, coco-yam, plantain, groundnuts, maize, shea-butter, etc. They are raised either to supply the needs of the inhabitants in the vicinity or for transport to markets for sale in districts where foodstuffs are scarce. With the development of cocoa, the cultivation of foodstuffs was somewhat neglected, but during the past three years, when prices for cocoa have been low, much greater attention has been given to the growing of food crops, with the result that supplies have increased very considerably. The cultivation of rice as a local foodstuff is being encouraged in the vicinity of Axim, where a rice mill has been erected. Sugar-cane is grown in certain parts of the country, but there is no local manufacture of sugar even of the most primitive type.

Other Agricultural Products.—Rubber and cotton are produced in small quantities for export. The former is a dying industry in the Gold Coast in consequence of the cost of preparation being greatly in excess of the existing values for the product, and the latter is still in the experimental stage. Tobacco and coffee are not unknown. Fruit is represented by bananas, oranges, grape-fruit, avocado pears, limes, pawpaw, and pineapple. A small plant has been erected by private European enterprise to deal with citrus products, and an area of approximately 3,000 acres is already planted with limes by native growers. The question of establishing a fruit canning industry is under consideration. In order to relieve the almost total dependence of the country on cocoa as an export crop, the possibility of growing bananas on a large scale is being explored, with a view to the ultimate development of an export trade in this product on properly organized lines. Regulations have been made prescribing standards of quality and the types that may be exported.

2. FOREST PRODUCTS.

The total area of forest land is estimated at 13,900 square miles, of which some 9,000 square miles are under commercial timber. It is not possible to ascertain the quantity of native timber used locally, but it is estimated that the industrial consumption during 1933 exceeded 15½ million cubic feet. Firewood is the sole fuel for domestic and the most important fuel for industrial use. The annual domestic consumption is estimated at 120 million cubic feet. Minor forest products are numerous and in daily use, but no figures are obtainable indicating the volume of trade in any one product.

Steps are being taken to conserve the forests of the Gold Coast in the interests of the cocoa industry, but a certain amount of legitimate exploitation takes place. Mahogany is the most important timber exported.

The export of timber, mostly mahogany, in the last five years is shown below:—

			Value.				Value.
			£				£
	Cub. ft.				Cub. ft.		
1929	1,430,230		160,364	1932	299,936		37,389
1930	934,790		100,098	1933	245,105		30,319
1931	636,127		62,479				

The reduction in exports has been due to the heavy fall in world prices, but measures are now under examination for improving the marketing of timber. The latter portion of the year 1933 put a period to the depressed state of the timber industry. The mahogany market particularly, made a satisfactory recovery. Other woods were not in great demand, though a new one, *mansonia*, was successfully introduced on to the United Kingdom market.

3. ANIMAL HUSBANDRY.

Cattle, sheep, and goats thrive in the Northern Territories and on the coastal plains. Cattle do not thrive in the forest area. Pigs are plentiful in the Colony and Ashanti. The following are approximate figures:—

	Cattle.	Sheep and Goats.	Pigs.
Colony	23,000	220,000	60,000
Ashanti	2,000	10,000	20,000
Northern Territories	130,000	455,000	7,000

Nevertheless there is annually a considerable maritime import as the following table shows:—

	1929.	1930.	1931.	1932.	1933.
Cattle	2,348	2,798	976	1,132	1,381
Sheep	10,901	14,323	9,790	420	8,458
Goats	2,222	1,356	352	43	644

The estimated number of stock imported overland is as follows:—

	1929.	1930.	1931.	1932.	1933.
Cattle	49,423	52,319	36,870	38,250	55,630
Sheep	84,673	61,079	34,249	29,066	45,954
Goats	20,269	14,909	8,498	6,973	13,845

Pasturage is generally poor. The scourge of rinderpest is rapidly being eradicated by immunization methods, and animal husbandry is receiving a good deal of attention, with the result that herds are increasing in number and quality. Native Administration cattle farms are being established and the inauguration of live-stock fairs is being attempted. The development of the industry is important in view of the fact that the Gold Coast imports more beef than any other country in the British Empire with the sole exception of the United Kingdom itself. The demand for fresh meat is, however, at present relatively small, the people preferring imported beef in canned or pickled form as being cheaper and more convenient to handle. Trypanosomiasis of domestic animals is common and a large proportion of the bovine population is infected at some time or other. In the north-eastern part of the Northern Territories the incidence of this disease appears to be low and it is in this area that the cattle are the most prolific. Clearing of rivers and streams has been experimented with and a reduction of the tsetse-fly has been secured in the areas dealt with.

It is impossible to estimate the number or value of live-stock annually slaughtered for food.

There is a small export trade in hides and skins.

4. MINERALS.

Gold, manganese and diamonds are produced in the Gold Coast. Gold is found, generally speaking, all over the forest area, and it has recently been located in parts of the Northern Territories; but it is only in certain districts that it can be extracted commercially. Mining is conducted by European companies, the largest mine, at Obuasi, being owned by the Ashanti Goldfields Corporation, Limited. Nearly all the gold is won from lode mines, but there is a small amount of alluvial mining.

The exports of gold for the last five years are as follows:—

					<i>Fine oz.</i>	<i>Value.</i> £
1929	...	...	...	...	202,847 (a)	861,677 (a)
1930	...	...	...	...	244,880 (a)	1,040,230 (a)
1931	...	...	...	...	246,162 (a)	1,045,676 (a)
1932	...	...	...	...	286,568 (b)	1,692,565 (b)
1933	...	...	...	...	294,373 (b)	1,841,883 (b)

(a) Estimated fine ounce (90 per cent. of the bullion ounces) and valued at 84/11½ per fine ounce.

(b) Actual quantity and value at time of shipment.

The gold premium is responsible for the development of considerable activity in the gold mining industry, which is reflected in the increasing quantity and value of exports.

Manganese is produced at Nsuta in the Western Province of the Colony by the African Manganese Company Limited. In past years large quantities have been exported. The peak of output was reached in 1929, but subsequently trade depression and competitive cut prices caused a slump. Now, however, the industry is reviving. Exports substantially recovered during 1933 and the figures for 1934 should be better, although latterly there have been indications of a falling off in shipments.

Exports for the last five years were:—

						<i>Value.</i> £			<i>Value.</i> £
		<i>Tons.</i>					<i>Tons.</i>		
1929	...	419,224				748,286	1932	...	50,688
1930	...	417,490				823,396	1933	...	265,140
1931	...	247,191				388,963			123,627
									357,366

Diamonds are found in the Birim valley. Diamond working is confined to four European companies. Here again, economic conditions have reacted on the industry, but not to the same extent; and the outlook is more satisfactory than it has been for some time, although it is difficult to gauge actual output.

The following table shows the exports for the last five years:—

						<i>Value.</i> £			<i>Value.</i> £
		<i>Carats.</i>					<i>Carats.</i>		
1929	...	660,536				584,613	1932	...	842,297
1930	...	861,119				658,994	1933	...	803,985
1931	...	880,479				440,924			518,400

Over 10,000 natives are employed in general mining operations throughout the country.

5. FISHERIES.

The Gold Coast has a large sea fishing industry which caters wholly for the local market. Fish is retailed fresh on the coast and is dried for transport up-country for sale. The industry is entirely in the hands of native fishermen using canoes.

A small quantity of fresh water fish is caught in the rivers.

It is impossible to estimate the value of the annual catch, nor can any idea be given of the numbers of the fishing community.

B.

FOOD SUPPLIES.

The Gold Coast is not self-supporting in foodstuffs, large quantities of flour, rice, meat, fish, sugar, and salt being imported annually. Attention is being given to this question at the present time, and it is not anticipated that any considerable dislocation of the economic life of the community would be involved by reason of the measures that can be taken. All the articles mentioned, except flour, can be and are produced in certain quantities, but it is doubtful whether production could ever be organized on such a scale as completely to satisfy the needs of the population.

Over 8,700 tons of flour were imported in 1933, valued at £128,000. Of this quantity 88 per cent. came from the United States of America, 6 per cent. from the United Kingdom and 5 per cent. from Canada. Rice came in to the extent of nearly 11,000 tons, valued at £117,000. The local output of rice was only 260 tons. The United Kingdom supplied over 60 per cent. of the total import of salt and 10 per cent. of the canned meats imported. Pickled and salted meats were largely of German or Danish origin, only 10 per cent. coming from the United Kingdom. Imported dried fish is essentially the produce of the Canary Islands and of the neighbouring French Colonies, and canned fish was consigned mostly from Portugal and the United States of America. Over 4,000 tons of sugar were imported in 1933, valued at £73,000, of which the United Kingdom supplied over half, Germany providing most of the balance.

VI.—Industry.

There are no important industries of a manufacturing nature in the Gold Coast.

The Shell Company of West Africa, Limited, has erected a petroleum bulk installation at Takoradi, which distributes imported petrol and oil in standard containers. Overseas Breweries, Limited, has built a brewery at Accra which is producing excellent beer. The Company regularly employs about 100 men. This locally manufactured beer is being exported to other parts of West Africa in addition to supplying the local market.

Small mineral-water factories and ice-making plants exist at one or two of the large centres and there is an electric bakery at Accra.

There is also a number of purely native industries which cater solely for the needs of the local population, such as weaving, pottery, basket-making, wood cutting and carving, canoe building, vegetable dyeing, and the blacksmiths' and goldsmiths' craft.

VII.—Other Economic Activities.

(i) The entrepôt trade of the Gold Coast is negligible.

(ii) There is no tourist traffic and no organization to encourage tourists. The attention of Messrs. Elder Dempster Lines, Limited has, however, been invited to the opportunities for this traffic which the Gold Coast affords.

VIII.—Communications.

There are 6,200 miles of motorable roads in the Gold Coast, of which 1,937 miles are maintained by the Public Works Department. Twenty-one per cent. of the latter are tarmetted, the remainder having a gravel surface. The maximum gross weight of motor vehicles permitted to use each class of road is prescribed.

The following vehicles were in use at the end of 1933:—

1,757 private motor cars.
4,818 lorries.

The Accra Town Council operates a service of motor omnibuses within the municipal area, and privately-owned omnibuses ply between Accra and Achimota, a distance of 8 miles. The Government Transport Department maintains a fleet of cars and lorries for official use, including a 15-ton road train.

Lorry traffic is considerable and is the source of much embarrassment to the railway.

The Gold Coast Government railway consists of two main lines both running from the coast northwards, one from Takoradi to Kumasi in Ashanti and the other from Accra to Kumasi. There is a branch line serving the Central Province of the Colony. The gauge is 3 feet 6 inches, and the total mileage operated is 500 miles. The line is open to passenger and goods traffic. There are extensive workshops at Sekondi. The railway has been working at a loss since 1929, but large economies have since been effected and steps are being taken to effect a legitimate distribution of road and rail traffic.

The rivers of the Gold Coast figure but little in the general transport system owing to the fact that they are not navigable by vessels other than canoes except in the lower reaches where launches can operate under certain conditions. On the western side, however, they are employed to float logs down to the sea.

The Gold Coast has no air communications.

At Takoradi there is an artificial deep water harbour, constructed at a cost of over £3,000,000, capable of accommodating nine vessels, three alongside and six at moorings with laden draught of 25 to 27 feet. The harbour is fully equipped with up-to-date appliances. The other ports consist of unprotected open roadsteads, but the port of Accra possesses a breakwater which permits the use of lighters within its shelter for the loading and unloading of bulky cargo.

Communication with the United Kingdom is primarily effected by the vessels owned by Messrs. Elder Dempster Lines, Limited, which maintains a regular fortnightly mail service between Liverpool and the West Coast of Africa, calling at Accra and Takoradi in the Gold Coast. The Company also operates a regular freight service between all West African ports and the United Kingdom and the Continent. Direct communication with New York and Montreal is occasionally provided. The voyage to and from England by mail vessel ordinarily occupies 13 to 14 days.

In addition, the United Africa Company, Limited, and various foreign steamship lines maintain a regular passenger and freight service between the Continent and the Gold Coast and other West African ports. Amongst the latter are the Woermann Line and its auxiliary Companies, the Holland West Afrika Line, the Chargeurs Reunis, the Fabre and Fraissinet Lines, and the American West African Line.

678 vessels of total net registered tonnage 1,919,759 entered the Gold Coast in 1933. Of these 359 were British of 956,412 net tons.

IX.—Tariff.

The tariff policy of the Gold Coast is that known as the "open-door" policy, with the exception of (a) the imports of the following textiles of Japanese origin which are subject to quotas:—

Cotton piece goods,
Cotton towels,
Cotton velveteen,
Artificial silk piece goods,

and (b) the imports of the undermentioned articles of Japanese origin on which additional duties are imposed :—

Cement,
Corrugated iron sheets,
Paints and colours,
Paint oils, polishes and varnishes,
Cardigans, jerseys and pullovers,
Shirts,
Singlets.

Imperial preference is not in operation because the country is prevented from granting it by the provisions of the Anglo-French Convention of 1898. The greater proportion of the Customs revenue is derived from specific duties although a large number of articles are liable to duty on an *ad valorem* basis.

X.—Trade Representatives.

The Gold Coast has no official trade representative overseas.

The Comptroller of Customs is the official representative in the Gold Coast of the Department of Overseas Trade, London, to which Department he transmits, as and when required, statistical and other information bearing on trade and traders of all classes in the country. There is a Trade Reference Room attached to the office of the Comptroller.

None of the Dominions or Colonies has a trade representative in the Gold Coast.

NIGERIA.

I.—Situation, etc.

1. SITUATION.

The Colony and Protectorate of Nigeria is the largest of the British West African possessions, its approximate area, including the area of the Cameroons under British Mandate, being 372,674 square miles, or more than three times that of the United Kingdom. The Protectorate is divided into two Administrative units, the Northern Provinces and the Southern Provinces, that part of the mandated area comprised in the Cameroons Province being administered with the latter.

It is bounded on the west and north by French territory, on the north-east by Lake Chad, on the east by the Cameroons, and on the south by the Gulf of Guinea and lies between latitude 4° 15' and 14° N., and longitude 2° 40' and 14° E.

Nigeria is divided into four main zones :—

(1) A belt of swamp and mangrove forest, 10 to 60 miles wide and following the coastline. It includes the delta of the Niger and is intersected by innumerable rivers and creeks.

(2) A belt of dense tropical forest from 50 to 100 miles wide, intersected by rivers and streams, and very rich in oil-palms, which constitute at present the chief wealth of Nigeria. The ground here is undulating with a few scattered hills, but there is no open ground except around villages and farms. This zone merges into the next, a line passing through the towns of Abeokuta, Ibadan, Ondo, Onitsha, and Afikpo serving as a rough boundary.

(3) A belt of more open country which gradually becomes clearer, park-like land being followed by open expanses covered with high grass. This zone is hilly, especially north of Ondo and on the frontier of the Cameroons.

(4) A vast undulating plateau, generally about 2,000 feet high, but, with occasional hills of granite and sandstone, rising, e.g., in parts of the Plateau Province and to the south-west of Yola to heights of over 6,000 feet. The southern portion of the plateau is covered by thin forest, but the country becomes more open towards the north, until at last the sandy tracts are reached that border on the Sahara.

In the north of the Cameroons Province begins the Central African plateau of an average altitude of about 4,000 feet rising in places to 8,000 feet. In the south near the sea is the Cameroons Mountain (13,350 feet). It is volcanic, and has been active as recently as 1922.

Nigeria has many important rivers. The Niger itself rises to the north-east of Sierra Leone, flows for about two-thirds of its length through French territory, and enters Nigeria from the west, running in a south-easterly direction to its confluence with the Benue (its principal tributary) at Lokoja, and thence southwards. About 5° 30' North, it splits into a number of channels, which finally run into the Gulf of Guinea. Other important rivers are the Rima (or Sokoto) and the Kaduna (tributaries of the Niger) and the Cross, which enters the sea close to the eastern frontier. There are a large number of smaller rivers.

2. CLIMATE.

There is a clear demarcation between the dry and rainy seasons. The former lasts from October to April in the north and November to March in the south, and is accompanied by the "Harmattan" (only intermittent in the south)—a dry dust-laden north-easterly wind. The rest of the year is the rainy season, the bulk of the rain falling between June and September. The amount of rainfall is very heavy on the coast and in the east (356 inches per annum is the average at Debundscha in the Cameroons) but decreases rapidly in the inland regions. Tornadoes commonly occur at the beginning and end of the rainy season. There is not much seasonal variation in temperature but, particularly during the "Harmattan" there may be a large diurnal variation. The range of temperature variation is greater inland than on the coast.

Nigeria shares with the other West African territories a reputation for unhealthiness and its climate cannot be regarded as healthy for Europeans except perhaps on the Plateau.

The following table shows the most significant figures for 1933, at the stations mentioned:—

Station.	Height above sea-level. Feet.	Monthly Maximum.		Monthly Minimum.		Rainfall. Inches.
		Highest. Fahr.	Lowest. Fahr.	Highest. Fahr.	Lowest. Fahr.	
Lagos						
Observatory	6	89·4 March	82·1 August	79·0 March	74·1 September	75·85
Katsina	1,770	104·1 April	86·3 August	77·1 April	58·2 December	33·49
Jos	4,010	88·8 March and November.	76·6 August	66·5 March	58·4 December	56·89
Calabar	42	89·5 February	81·7 August	74·4 February	68·3 December	128·12
Owerri	230	92·0 March	83·1 August	72·0 February	68·4 December	119·1

3. SURVEYS.

Considerable progress has been made with a trigonometrical survey of Nigeria and topographical surveys on the base of it are proceeding, some 10 per cent. of the area having been mapped on the scale of 2 miles to the inch. Cadastral surveys have been made of townships, Government acquisitions, and private leaseholds.

4. LAND TENURE.

A report made in 1908 by a Committee of Inquiry into the system of land tenure in Northern Nigeria established the fact that according to native law and custom no private estate could exist, and that all land was the property of the community. Land was granted to individuals who had the use and enjoyment of it, but, as this grant could at any time for particular reasons be revoked, there was no freehold as understood in England. In evidence given before the West African Lands Committee in 1912 it was maintained that in Southern Nigeria the general rule was that each community had rights of distribution among its members over a certain tract of land, the distribution being carried out by the head of the community acting in concert with a council of elders and each member of the community being entitled to the use of sufficient land to provide for his sustenance. Subject to good behaviour and to the performance of his duties towards the state he could retain this land for life, and at his death it would pass, usually, to his eldest son, but always subject to the approval of the original grantors.

Legislation has been enacted to prevent wholesale alienation of land under economic pressure and the introduction of extraneous forms of land tenure.

In the Northern Provinces to-day all land is held in trust for the people by the Governor, and his consent is necessary for any grant of title to the use and occupation of land, for the transfer of possession or other dealing in land, and the alienation of land to non-natives. No grants of freehold are made, but building and agricultural "rights of occupancy" are granted by Government with conditions as to improvements, and revision of rent at stated intervals.

In the Southern Provinces lands are not at the disposal and under the control of the Governor in the same way as are native lands in the Northern Provinces, but lands may not be leased to a non-native except with the consent of the Governor. Except in a few cases where absolute ownership has been recognized in the past, non-native interests are now practically confined to leases for not more than 99 years.

The greater part of the land in the Southern Provinces is still held under rights which, by long occupation, have matured into family rights, but an increasing proportion of the land in the more developed regions is passing into individual ownership.

Within the Colony of Nigeria individual ownership is everywhere recognized and the restrictions as to alienation to non-natives do not apply.

Crown Land is of limited extent, the greater part being lands acquired by the Government for public purposes.

The Governor may grant leases of Crown Land, generally for not more than 99 years, but sales require the prior consent of the Secretary of State.

II.—Population.

Nigeria is divided among a great number of tribes. Their origin and ethnological classification are obscure, but they may be divided into two main groups; the people of the north, who are organized in a number of Moslem states, and some Moslem nomads and a number of smaller unassimilated tribes; and the politically less developed tribes of the coast and forest regions.

The total population in 1931 was 19,928,171, distributed as follows:—

	Total.	Natives of Nigeria.	Non-Nigerian Africans.	Non-Natives.
Northern Provinces	11,434,924	11,422,510	10,589	1,825
Southern Provinces	8,493,247	8,473,012	16,618	3,617
Nigeria	19,928,171	19,895,522	27,207	5,442

Nearly 2,500 of the non-native male population were in Government service, leaving, after exclusion of 1,066 females, less than 2,000 European and Syrian males, mostly engaged in commerce. Syrian males numbered 283, of whom 247 were adults. The trading activities of the Syrians in Nigeria are considerable, in view of the relative smallness of their numbers.

The division of the population among the principal tribal groups is as follows:—

	Per cent.		Per cent.
Fulani	10	Kanuri	5
Hausa	18	Munshi	3
Ibibio	4	Yoruba	16
Ibo	16	Other	28

Hausas and Fulanis together form 50 per cent. of the population of the Northern, and Ibos and Yorubas together 70 per cent. of the population of the Southern, Provinces. The total population at the end of 1933 was estimated at 19,814,542.

Occupations.—The following figures show the primary occupation of persons classified, but the majority of farmers engage in petty trade, and work sometime or other as transport workers.

Table showing the proportion of persons per mille, engaged in each main occupation, for those in classified occupations only.

	Nigeria.	Northern Provinces.	Southern Provinces.
I. Farming	737	695	809
II. Mining	2	3	—
III. Manufactures*	114	144	61
IV. Transport	2	2	1
V. Commerce	59	47	80
VI. Government and Native Administration	4	4	4
VII. Professions	5	5	4
VIII. Personal Service	64	89	19
IX. Miscellaneous	13	11	22

* Mainly village industries of spinning and weaving, dyeing, basket- and mat-making, oil-making, and blacksmithery and urban occupations such as butchers, bakers, tailors, builders, bricklayers, and carpenters, besides a few brass-workers and silversmiths.

Immigration and Emigration.—Border natives pass freely to and fro without restriction, but immigration and emigration cannot be said to affect vitally the life of the community.

Immigrant non-natives are required to produce documents of identity and none of good repute would be refused admittance. A guarantee up to £60 is required in doubtful cases.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the pound, maintained at par with sterling by the West African Currency Board which issues and redeems currency in the four British West African Colonies against deposits and withdrawals of sterling in London. The media of circulation consist of £1 and 10s. notes, and alloy and nickel-bronze coins of 2s., 1s., 6d., 3d., 1d., $\frac{1}{2}$ d., and $\frac{1}{10}$ d. issued by the Board.

2. Banking operations are carried on by the Bank of British West Africa, Limited, and Barclays Bank, Limited (Dominion, Colonial, and Overseas) both with numerous branches throughout Nigeria and with their head offices in London, and by the Industrial and Commercial Bank, Limited, and the National Bank of Nigeria, Limited, recently constituted with offices only in Lagos.

The Bank of British West Africa, Limited, has branches at:—Aba, Abeokuta, Abonnema, Calabar, Ebute Metta, Enugu, Ibadan, Jos, Kaduna, Kano, Lagos, Lokoja, Maiduguri, Makurdi, Onitsha, Opobo, Oshogbo, Port Harcourt, Sapele, Warri, and Zaria.

The branches of Barclays Bank, Limited (Dominion, Colonial, and Overseas) are at Aba, Burutu, Ebute Metta, Ibadan, Ijebu Ode, Jos, Kano, Port Harcourt, Victoria, Zaria, and Lagos.

3. The Government does not participate in any ordinary banking operations.

Small loans are being granted to farmers to assist and encourage the purchase of simple machines for the extraction of oil from palm kernels.

B.—PUBLIC FINANCE.

1. Public debt as at 31st March, 1934.

	£
(a) Total Public Debt	27,822,582
(b) (i) Annual Interest	1,369,082*
(ii) Annual Contribution to Sinking Fund	254,364
(c) (i) Total value of the Sinking Funds 31st March, 1934	3,721,521
(ii) See paragraph 4 for particulars of the Reserve (Supplementary Sinking) Fund.	

* £875,320 of the Annual Interest is paid by the Nigerian Railway.

Statement of existing Loans at 31st March, 1934, showing annual charges.

Year.	Amount.	Interest.		Sinking Fund.		Total Annual Charges.	Period of Redemption.	
		Rate.	Annual Interest.	Rate.	Annual Contribution.			
		Per cent.	£	Per cent.	£			
1905 ...	2,000,000	3 $\frac{1}{2}$	70,000	1	20,000	90,000	1930–1955	Trustee Security.
1908 ...	1,232,661	3 $\frac{1}{2}$	43,143	1	12,327	55,470	1930–1955	" "
1911 ...	812,932	3 $\frac{1}{2}$	28,453	1	8,129	36,582	1930–1955	" "
1919 ...	6,363,226	6	381,794	$\frac{1}{2}$	39,770	421,564	1949–1979	" "
1921 ...	3,200,390	6	192,023	1	32,004	224,027	1936–1946	" "
1923 ...	5,700,000	4	228,000	1	57,000	285,000	1963	" "
1927 ...	4,250,000	5	212,500	1	42,500	255,000	1947–1957	" "
1930 ...	4,263,373	5	213,169	1	42,634	255,803	1950–1960	" "
Total ...	27,822,582	—	1,369,082	—	254,364	1,623,446	—	

2. Revenue.

(A) Analysis of Revenue (on basis of Estimates for the year ending 31st March, 1935).
Self-balancing Departments.

	Revenue.	Expenditure.
	£	£
Railway (including capital expenditure)	1,884,750	2,132,019
Government Collieries	90,000	63,222
Electricity Supply	75,890	64,457
Posts and Telegraphs	97,340	149,839
Water Supply	32,703	35,844
	<u>£2,180,683</u>	<u>£2,445,381</u>

Net deficit, £264,698.

General Revenue.

	£	£	Per cent.
(1) Customs, i.e. :—			
Import Duties	1,650,550		
Export Duties	450,000		
Miscellaneous	8,102		
		2,108,652	50·7
(2) Fees of Court, etc.		185,630	4·5
(3) Direct Taxes		900,846	21·7
(4) Marine and Harbour		225,700	5·4
(5) Interest		320,164	7·7
(6) Licences, internal revenue, rents and miscellaneous ...		392,564	9·4
(7) Receipts from Colonial Development Fund		23,089	0·6
		<u>£4,156,645</u>	<u>100</u>
Revenue of self-balancing Departments set off against Expenditure.		2,180,683	
Total Revenue		<u>£6,337,328</u>	

2. (B) Analysis of Import Duties for 1933.

(i) Amount of duty collected on articles imported from:—

	£
United Kingdom	1,055,233
Rest of Empire	38,146
Foreign Countries	646,019
	<u>1,739,398</u>
Parcel Post (from all countries)	19,432
	<u>1,758,830</u>

(ii) Amount of duty collected on the several Classes of merchandise.

	£
Class I	883,756
Class II	465
Class III	855,177
Class IV (Parcel Post)	19,432
	<u>1,758,830</u>

3. Analysis of Expenditure (on basis of Estimates for the year ending 31st March, 1935).

	£	Per cent.
(1) Deficit on self-balancing Departments (See 2(A)) ...	264,698	5·9
(2) Debt Charges	751,668	16·7
(3) Administration	1,230,929	27·4
(4) Economic Development	732,529	16·3
(5) Social Services	741,565	16·5
(6) Defence	300,748	6·7
(7) Pensions and Gratuities	439,461	9·8
(8) Expenditure from Colonial Development Fund ...	29,671	·7
	<u>£4,491,269</u>	<u>100·0</u>
Expenditure of self-balancing Departments set off against Revenue.	2,180,683	
Total	<u>£6,671,952</u>	

4. Reserve Funds.

The Supplementary Reserve (Sinking) Fund, which is wholly invested in Trustee Securities, amounted at 31st March, 1934 (market value of Securities) to £930,364.

5. Grants and Loans-in-Aid.

No financial grants have been received from the Imperial Treasury except through the Colonial Development Fund.

Grants received from the Colonial Development Fund amount to £96,907 and a further £73,572 has been approved.

The particulars of the schemes approved are as follows:—

	£
Dietetics Research	3,543
Veterinary Scholarships	1,236
Tsetse Fly Investigation	1,500
Public Health Improvements	50,200
Relaying Minna-Kaduna Railway—Interest for seven years on £326,000* at 5 per cent. per annum	114,000*
	£170,479

* Approximate figures.

IV.—Trade Statistics.*

EXPORTS.

(i) Total Exports (including Bullion and Specie) to:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	3,744,516	349,208	3,258,653	7,352,377
1930	6,183,956	205,968	8,784,401	15,174,325
1931	5,123,154	121,616	5,399,749	10,644,519
1932	3,504,895	127,935	5,996,114	9,628,944
1933	3,764,389	172,896	5,129,858	9,067,143

(ii) Domestic Exports by Classes, 1933.

	Class I.	Class II.	Class III.	Class IV.	Class V.	Total Merchandise and Bullion.
	£	£	£	£	£	£
To:—						
United Kingdom	355,608	2,886,812	1,752	77	99,737	3,343,986
Rest of Empire	7,613	81,204	34,238	14,135	—	137,190
Total Empire	363,221	2,968,016	35,990	14,212	99,737	3,481,176
Germany	294,202	1,231,393	27	27	—	1,525,649
France	3,021	1,296,871	—	—	—	1,299,892
Holland	314,936	497,605	20	25	—	812,586
United States of America	216,595	530,426	27	—	—	747,048
Other foreign countries... ..	14,905	672,304	5,960	541	—	693,710
Total foreign countries	843,659	4,228,599	6,034	593	—	5,078,885
GRAND TOTAL	1,206,880	7,196,615	42,024	14,805	99,737	8,560,061

(iii) Principal Domestic Exports, 1933.

Article.	Total Quantity.	Total Value.	Principal countries of destination with amounts in £'000.
		£	
Class I.			
Cocoa	60,737 tons	1,143,627	United Kingdom (353), Holland (302), Germany (257), United States of America (216).
Class II.			
Groundnuts	204,606 tons	2,064,369	France (1,170), Germany (280), United Kingdom (244), Italy (162), Holland (143).
Palm Kernels	259,945 „	1,898,522	United Kingdom (759), Germany (749), Holland (220).
Palm Oil	128,696 „	1,384,431	United Kingdom (697), United States of America (243), Italy (214), Germany (122).
Tin Ore	5,216 „	658,598	United Kingdom (all).
Hides and Skins—			
Goat skins, untanned	36,002 cwt.	307,306	United States of America (158), United Kingdom (76), France (54).
Cattle hides, untanned	67,991 „	173,593	France (61), United Kingdom (59), Italy (23), Spain (11), Germany (7), Greece (3).
Sheep skins, untanned	12,457 „	74,759	United States of America (68).
Other kinds	4,543	69,019	United Kingdom (44), Tripoli (11).
	120,993 „	624,677	
Cotton lint	9,863,134 lb.	192,989	United Kingdom (183).
Wood and Timber, unmanufactured.	—	103,140	United Kingdom (63), Germany (31).
Benniseed	9,658 tons	79,645	Holland (29), Italy (27).
Shea-nuts	10,341 „	65,643	Holland (44), United Kingdom (21).

* All trade statistics have been recorded according to the country from or to which the goods are consigned. As from the 1st of January, 1934, imports have been classified by country of origin.

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from :—*

				<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
				£	£	£	£
1913	...	...	...	4,938,243	483,194	1,780,382	7,201,819
1930	...	...	...	8,170,283	344,329	3,721,618	12,700,037†
1931	...	...	...	4,646,052	197,321	1,745,044	6,744,199†
1932	...	...	...	5,223,634	247,396	1,639,656	7,245,943†
1933	...	...	...	4,576,482	268,099	1,686,057	6,645,268†

† Includes unclassified imports by Parcels Post from all countries as follows :—

				£				£
1930	...	...	...	463,807	1932	...	...	135,257
1931	...	...	...	155,782	1933	...	...	114,630

(ii) *Imports by Classes, 1933.*

<i>From :—</i>				<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
				£	£	£	£	£
United Kingdom	...	...	...	935,346	60,100	3,280,429	147	4,276,022
India	...	...	...	11,291	—	191,374	—	202,665
Rest of Empire	...	...	...	42,345	49	19,392	848	62,634
<i>Total Empire</i>	...	...	...	988,982	60,149	3,491,195	995	4,541,321
Germany	...	...	...	115,171	2,844	406,721	29	524,765
United States of America	...	...	...	117,692	2,102	279,236	4	399,034
Japan	...	...	...	108	—	316,517	—	316,625
Holland	...	...	...	41,647	738	118,348	—	160,733
France	...	...	...	21,552	482	60,486	—	82,520
Other foreign countries	...	...	...	48,219	2,863	87,653	—	136,274
<i>Total foreign countries</i>	...	...	...	344,389	9,175	1,329,748	33	1,683,345
Parcels Post	...	...	...	—	—	—	114,630	114,630
GRAND TOTAL	...	...	...	1,333,371	69,324	4,820,943	115,658	6,339,296

In addition there were imports of bullion and specie to the value of £300,460 from the United Kingdom; £2,800 from the rest of the Empire and £2,712 from foreign countries, total £305,972.

(iii) *Principal Imports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of consignment with amounts in £'000.</i>
			£	
Tobacco—				
Cigarettes	...	2,519,387 hundreds	205,810	United Kingdom (204).
Unmanufactured	...	2,375,604 lb.	118,824	United States of America (77), United Kingdom (41).
Other kinds	...	—	4,906	
			329,540	
Fish—				
Dried, smoked, salted, etc.	...	8,819 tons	250,017	United Kingdom (169), Germany (45), Norway (32).
Other kinds	...	288 „	16,868	United Kingdom (8), Germany (4).
		9,107 „	266,985	
Salt (all kinds)	...	867,391 cwt.	205,220	United Kingdom (195).
Grain, flour, pulse, etc.	...			
Rice	...	125,658 „	61,846	United Kingdom (37), India (11).
Flour, wheaten	...	55,863 „	43,373	United States of America (32), United Kingdom (11).
Other kinds	...	1,957 „	4,134	United Kingdom (2).
		183,478 „	109,353	
Spirits—				
Whisky	...	28,414 gal.	32,895	United Kingdom (32).
Gin and Geneva	...	81,595 „	28,594	Holland (16), United Kingdom (11).
Other kinds	...	7,396 „	13,939	United Kingdom (6).
		117,405 „	75,428	
Sugar, all kinds	...	3,422 tons	58,835	United Kingdom (30), Germany (16).
Ale, beer, etc.	...	271,174 gal.	51,325	United Kingdom (31), Germany (16).

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of consignment with amounts in £'000.</i>
<i>Class III.</i>			
<i>Cotton Manufactures—</i>			
<i>Piece Goods—</i>			
Coloured	26,140,976 sq. yd.	604,677	United Kingdom (416), India (107), Japan (69).
Bleached	31,329,556 „	591,092	United Kingdom (527), Japan (42).
Printed	11,290,394 „	266,288	United Kingdom (174), Holland (43).
Grey	16,363,032 „	232,445	United Kingdom (168), Germany (41), Japan (22).
Dyed in the piece	7,676,303 „	169,328	United Kingdom (155).
	<u>92,800,261 „</u>	<u>1,863,830</u>	
Other kinds	—	217,703	United Kingdom (160).
		<u>2,081,533</u>	
<i>Iron and Steel Manufactures</i>			
Corrugated iron sheets	8,481 tons	127,186	United Kingdom (124).
Other kinds	—	323,922	United Kingdom (220), Germany (67).
		<u>451,108</u>	
<i>Oils—</i>			
Motor Spirit	2,602,768 gal.	135,347	United States of America (120).
Illuminating	1,960,781 „	89,363	United States of America (67), Portugal (16).
Lubricating... ..	355,980 „	36,889	United States of America (18), United Kingdom (15).
Other kinds	275,274 „	9,125	United Kingdom (4).
	<u>5,194,803 „</u>	<u>270,724</u>	
<i>Silk and Artificial Silk Manufactures—</i>			
Silk (all kinds)	—	38,593	United Kingdom (14), Japan (10), Germany (8).
Artificial silk	7,326,777 sq. yd.	201,168	Japan (93), United Kingdom (63).
		<u>239,761</u>	
Bags and Sacks	8,473,647	204,454	United Kingdom (114), India (83).
<i>Motor-cars, etc., and parts—</i>			
Motor-cars	462	64,056	United Kingdom (54).
Motor-lorries	437	62,415	United States of America (37), United Kingdom (23).
Motor-car and lorry parts	—	32,511	United Kingdom (19), United States of America (11).
Tyres and tubes	26,080	41,342	United Kingdom (34).
		<u>200,324</u>	
Apparel	—	122,883	United Kingdom (79).
Casks, shooks, staves and headings	—	91,887	United Kingdom (52), Germany (16), Italy (10).
Cement	27,740 tons	78,363	United Kingdom (63), Italy (9).
Medicines and Drugs... ..	—	72,093	United Kingdom (65).
Chemicals	—	57,838	United Kingdom (52).
Implements and Tools (all kinds) ^a	—	56,567	United Kingdom (30), Germany (23).
<i>Woollen Manufactures—</i>			
Yarn	95,424 lb.	15,487	United Kingdom (15).
Other kinds	—	37,231	United Kingdom (34).
		<u>52,718</u>	

V.—Natural Resources.

A.

1. AGRICULTURE.

Nigeria is fortunate in not depending upon only one crop for her trade and prosperity. The agriculture of the country is almost entirely a peasant industry, and, as the production of food crops is still the most important feature of the local agriculture, the country is practically self-supporting in so far as the Africans generally are concerned. The chief food crops are yams and maize in the south, and guinea corn and millet in the north. There is no export trade in either of these crops.

The main agricultural exports in order of gross value are the products of the oil palm—palm oil and palm kernels—groundnuts, cocoa, and cotton. Of these palm oil, palm kernels, and cocoa are produced only in the Southern Provinces and are the produce of permanent crops, which are greatly favoured by the native farmer, as once established and mature they will continue to produce a crop annually for many years with little labour.

Benniseed and rubber are minor export crops, but many other crops are grown which under suitable circumstances might develop into definite local industries. Such crops are ginger, pine-apples, citrus fruits, peppers, and rice. All the export crops with the exception of cocoa were originally grown on a small scale for local consumption and have been gradually developed to their present position.

The production of kola nuts is steadily increasing in the Southern Provinces. The nuts produced are all used for local consumption, but they have had a real effect on the trade of Nigeria, for instead of importing some 6,000 tons of kolas from the Gold Coast and Sierra Leone, as was done a few years ago, Nigeria is now very nearly self-supporting in this respect.

In spite of the steady fall in prices during the last three years the volume of exports of all agricultural produce with the exception of cotton, has been more than maintained; cotton suffered a severe set back in 1931-32 but is now increasing again. The low prices have, of course, decreased the total value of the produce exported and this has been reflected in the decreased value of the import trade which mainly consists of what to the bulk of the population are luxuries.

Except perhaps in the case of palm oil for a short time the low prices do not seem to have led to any reduction of production in Nigeria. The producer must have some ready money with which to pay his tax and to buy those so-called "luxuries" which are now almost necessities, and the general volume of exports may be expected to remain at about their present level even if there is no great rise in the price level. While a rise in prices might be expected to increase the production of groundnuts and cotton it is doubtful if it would cause any great immediate increase in the production of cocoa or palm produce.

Products of the oil palm.—The oil palm is said to grow wild all over the greater part of Southern Nigeria. Many of the existing trees were planted by man, but they now receive no cultivation or attention and are in effect wild. In recent years however there has been a revival of planting. By the end of 1933 approximately 400 persons had planted 900 acres of palm plantations. The great handicap to the spread of this important improvement in local agriculture has been public opinion which adheres strongly to the ancient customs affecting land. In most districts the value of the planted palm is now beginning to be appreciated. Some 220 acres of young palms planted in 1928-30 are now bearing well. Palm oil is extracted from the pericarp of the fruit of the oil palm and the kernel is obtained by cracking the hard shell of the nut which is left after the pericarp has been removed.

<i>Palm Kernels.</i>						<i>Average annual</i>			
						<i>Export in tons.</i>	<i>price per ton at Lagos.</i>		
							£	s.	d.

plantations is beginning to spread rapidly. Not only will such palms give a greater yield than wild palms, but they will also commence to fruit much earlier. Similarly a new type of press is coming into use, which can recover at least 20 per cent. more oil than is extracted by native methods. Ninety of these presses are now in use, as against forty at the end of 1932.

Groundnuts.—The production of groundnuts for export is almost entirely confined to the light sandy soils of the extreme north of Nigeria and especially of Kano. It is impossible to give figures for total production as there is no means of ascertaining local consumption, but on the basis of the export figures production is steadily increasing in spite of the fall in price.

						Exports in tons.	Average price at Kano 1st October to 31st March. £ s. d.
1929	...	...	...	...	...	147,379	10 9 6
1930	...	...	...	...	...	146,371	8 18 0
1931	...	...	...	...	...	159,739	4 17 0
1932	...	...	...	...	...	188,123	7 10 0
1933	...	...	...	...	...	204,606	5 14 0

As the end of the calendar year falls in the middle of the exporting season these figures represent in each case parts of two seasons' crops. It is estimated that exports of the 1934-35 crop will amount to about 160,000 tons.

There has been a very big increase in quantity exported since the 1928 season, due to the opening up of new branch railways which have enabled the industry to develop in new areas and the new policy adopted in 1931 of charging a zone rate instead of a rate calculated on the distance of each railway station from the Port, thus greatly increasing the area of collection. Considerable expansion is still possible and, while the export for 1932 namely 188,123 tons constituted a record, it was surpassed in 1933 when exports were over 200,000. It seems likely that the producer near the railway will go on growing groundnuts even if the price falls to a still lower level, since it is his only money crop, but the very low price (only £2 7s. 6d. to £2 15s. 0d.) which was paid at Kano in the latter part of 1933, it is believed, led to some reduction of planting in 1934, which will be reflected in the export of 1935.

Considerations closely affecting the development of the industry are the cost of transport which is high owing to the distance from the coast, and the possibility of technical innovations such as the general adoption of cultivation by cattle-drawn implements, the introduction of a heavier yielding variety, or of a variety which will give a profitable yield on the heavier types of soil.

Cocoa.—The main crop season lasts from October to March; figures of exports for the years ending 31st December are:—

						Exports in tons.	Lagos average monthly price per ton. £ s. d.
1929	...	...	...	...	...	55,236	34 7 0
1930	...	...	...	...	...	52,331	26 3 0
1931	...	...	...	...	...	52,806	17 11 0
1932	...	...	...	...	...	71,035	15 16 0
1933	...	...	...	...	...	60,737	14 14 0

Cocoa is not consumed locally, and the export figures therefore represent the total production. The crop is susceptible to weather conditions and the quantity exported fluctuates accordingly. Cocoa trees in Nigeria on the less suitable types of soil tend to pass their maximum productivity after they are about 18 years of age. Instances of this are found around Agege in the Colony, and on such soils, where the cocoa is going back, it is being cut out and replaced by kola. New areas of cocoa coming into bearing have more than made good the loss from areas which have gone out of bearing. The increase in exports in recent years shows that the acreage of cocoa coming into bearing must be very considerable. Much of this new cocoa was planted in the years 1926, 1927, and 1928 when "boom" prices no doubt stimulated planting. The full effect of these plantings was apparently beginning to show in the crop of 1932. The normal increase seems to be some 6,000 or 7,000 tons every two or three years. Considerable additions to the acreage under cocoa are being made in the Ondo Province and in the adjacent districts of neighbouring Provinces. In Ondo Province the cocoa crop in 1930-31 was some 1,700 tons, in 1931-32 it was 3,000 tons, and in 1932-33 it was 4,800 tons.

The annual increase cannot be expected to continue at this high rate but it may reasonably be expected that there will be some increase for some years to come and that a production of cocoa of 100,000 tons will be reached.

There was an improvement in the quality of cocoa in 1932-33 as compared with previous years. The first grade cocoa produced constituted 16 per cent. of the whole as against 13 per cent. in 1931-32 and 8.5 per cent. in 1930-31. All cocoa is most thoroughly examined and graded at the time of purchase by the exporters at the numerous local buying places. The price margins vary from year to year according chiefly to the general level of cocoa prices. Recently the margins between first and second grade, and between second and third grade have been generally 15s. per ton. In addition the numerous co-operative cocoa producers' Societies, by preparing their cocoa carefully and selling it in parcels of ten tons or more, consistently obtain £1 to £1 10s. per ton above the price of ordinary first grade cocoa in small parcels. In 1932-33 these societies, with a total membership of about 2,500, sold some 1,300 tons of cocoa for about £20,000. This movement was started on a small scale in 1922, progressed only very slowly for several years, but is now beginning to increase rapidly.

Cotton.

Northern Provinces.—Cotton is grown all over the Northern Provinces for the local hand spinning and weaving industry, but the growing of cotton for export is almost entirely confined to the Zaria and Sokoto Provinces. A considerable quantity is grown in the Kano Province but this is almost completely absorbed by the local weaving industry. In the exporting areas American cotton, Allen's Long staple, has now completely replaced the local indigenous types and the cotton exported from Northern Nigeria has a high reputation for uniformity and reliability. The following table shows the quantity exported and the price paid to the producer in recent years :—

Exports of American Cotton (in bales each of 400 lb. net) and buying prices (in pence per pound of seed cotton).

Year.	Bales.	Price.
1929-30	34,389	1·6d. falling to 1·2d.
1930-31	13,849	0·8d. falling to 0·5d.
1931-32	4,811	0·6d. rising to 0·8d.
1932-33	22,228	0·8d. and 0·9d. fluctuating.
1933-34	23,013	0·9d. rising to 1·2d.

There are no statistics available to show the normal annual consumption of the local weaving industry, so that it is impossible to give any figure for total production, but the figures of cotton seed distributed which are set out below give some indication. The quantity absorbed locally must be fairly considerable and is probably also fairly stable. When prices are low or the crop is short the local industry competes directly with the export trade and the price in the local markets rises above that paid by the exporters. The local demand is in a sense a safeguard to cotton growing in the Northern Provinces for, no matter how the world price of cotton falls, this local demand always exists and cotton is grown to meet it. With this as a nucleus the industry can expand again very rapidly.

The cotton growing industry received a severe set-back in the 1931-32 season and the exports fell to 4,800 bales. This reduction was not caused entirely by the low price. The locust situation caused the farmer to concentrate on food crops at the expense of cotton cultivation. The crop now ripening is believed to be of record acreage and high average yield per acre and it is anticipated that the total export of the season 1934-35 will considerably exceed any previous figure, possibly reaching a figure of as much as 45,000 bales.

Cotton production in the Northern Provinces is capable of further expansion but the gross possible production is definitely limited. An export of 50,000 bales may well be attained when a good season as regards weather coincides with a favourable economic situation, but it is doubtful if 75,000 bales will be exceeded or even reached—

(a) unless the price of seed cotton should for a few years vary around 2d. per lb., or

(b) until the whole farming system is radically changed by the introduction of mixed farming involving as it does the use of animals for the production of manure and for ploughing.

Southern Provinces.—Cotton growing for export in the Southern Provinces is mainly confined to the Oyo and Abeokuta Provinces. It is grown as a catch crop and is interplanted with cowpeas, egusi and late maize or yams—it is seldom grown as a sole crop.

Exports (in bales of 400 lb. net) and buying price (in pence per pound of seed cotton).

Season.	Native Cotton.		Improved Ishan.	
	Bales.	Price.	Bales.	Price.
1928-29	5,771	1½d. to ½d.	939	2½d. to 2½d.
1929-30	2,719	½d. to ¾d.	6,026	1½d. to ¾d.
1930-31	313	½d. to ¾d.	4,289	¾d. to ½d.
1931-32	4	½d. to ¾d.	1,330	¾d. to ½d.
1932-33	4	½d.	860	¾d.
1933-34	118	¾d.	2,884	1d. to 1½d.

Since 1930 Improved Ishan has replaced the indigenous native cotton for export. Native cotton is now only grown for local weaving, for with prices as low as they are at present it is almost unsaleable in the world's markets. Should the price paid for seed cotton rise to a level of about 1½d. per lb. it is probable that a very considerably increased acreage, compared with the recent seasons would be planted and an export of 10,000 bales could be produced. It is possible that with an even higher price a slightly greater export could be anticipated but it is unlikely that the Southern Provinces will ever produce much above 10,000 bales for export. There are large areas where it is probable that cotton could be grown satisfactorily but such areas are only scantily populated and cotton growing on a big scale cannot be expected under existing conditions.

The following table shows the total amount in tons of cotton seed distributed to growers :—

	1930.	1931.	1932.	1933.	1934.
Northern Provinces, American ...	2,791	1,569	1,673	2,374	3,807
Southern Provinces, Improved Ishan	115	57·4	26	71	77
Southern Provinces, Native ...	140	33	9	(no record)	1
Total	3,045	1,659·4	1,708	2,445	3,885

Total exports for statistical years: 1929, cwt. 117,302; 1930, cwt. 160,166; 1931, cwt. 70,301; 1932, cwt. 23,818; 1933, cwt. 88,064.

Benniseed.—The growing of benniseed for export has hitherto been confined almost entirely to the Tiv people of the Benue Province, but it is grown on a small scale for local consumption in most parts of Northern Nigeria. In the Benue Province benniseed is the only money crop of the Tiv farmer and as he depends upon it entirely as a source of cash the fall in price has so far stimulated him to increased production. The export of benniseed fluctuated between 1,000 and 2,000 tons previous to 1925 but since then it has risen to 9,658 tons in 1933. There has recently been a tendency for the growing of benniseed to spread to adjacent Provinces and a steady increase in production can therefore be expected.

Rubber.—There was at one time a small export of wild rubber from Southern Nigeria, but it is doubtful if any wild rubber is now exported. The 2,000 tons or so which are exported annually are produced mainly from one or two European-owned plantations, but there are also a few small African-owned plantations. The industry is not of any importance and the output is unlikely to increase substantially.

Kola.—In recent years kola has been extensively planted all over Southern Nigeria particularly in the Colony and the Abeokuta Province. Since it will grow well on soils which are unsuitable for cocoa it is now being planted by farmers in the Benin and Onitsha Provinces. In 1928 some 6,000 tons of kola nuts were imported from the Gold Coast and Sierra Leone, but by 1933 the imports had fallen to the neighbourhood of 900 tons. At the same time local production has increased considerably. Kola nuts are used entirely for local consumption the chief market being the Northern Provinces, so that it is impossible to give more than an estimate of the quantity produced locally.

Year.	Estimated total local production.	Year.	Estimated total local production.
1929	6,300 tons.	1932	10,700 tons.
1930	6,800 tons.	1933	11,100 tons.
1931	9,900 tons.		

It is estimated therefore that during the last five years kola production has increased at the rate of approximately 1,000 tons per annum, and in view of the widespread extension of cultivation there is every indication that over-production is imminent since the market for kola nuts is definitely restricted.

Bananas.—There has been a substantial development in recent years in the export of bananas from the Cameroons under British Mandate. The bananas are grown on the German-owned plantations; the greater part of the fruit goes to Germany and most of the remainder to Holland. The fruit was at first exported in dried form, but the export of fresh fruit has increased rapidly since 1929, when the first trial consignments were sent.

The following table shows total exports during recent years:—

	1929.	1930.	1931.	1932.	1933.
Fresh bananas	Tons (trial consignments)	1,353	10,217	14,832	16,789
equivalent to	Bunches	70,000	650,000	850,000	1,000,000
Dried bananas	Tons	1,127	1,436	445	463
				463	453

Ginger.—Ginger is at present a crop of minor importance in the trade of Nigeria, but as it is a relatively high-priced product, and Nigerian ginger is already gaining a reputation for quality, the industry is capable of considerable expansion. It is grown for export only in Southern Zaria and parts of the Plateau Province, and the amount exported, though still small, is increasing annually. During the present season exports amounted to 100 tons.

Pineapples.—Experimental shipments of pineapples have been made to the United Kingdom and satisfactory results have been obtained. Efforts are being made by the Department of Agriculture to test the possibility of developing an export trade with this fruit.

2. FORESTRY.

The forest area of Nigeria is approximately 216,000 square miles in extent; these forests are of four main types, viz.:—

	Sq. miles.		Sq. miles.
Mangrove forests occupying an approximate area of	6,000	Mixed deciduous forests occupying an approximate area of	10,000
Tropical rain forests occupying an approximate area of	35,000	Savannah and orchard forests occupying an approximate area of	165,000

The timber in the savannah and orchard forests is of no great commercial value; of the others all the mangrove, 31,000 square miles of rain forest and about 8,000 of mixed deciduous forest are of commercial value.

Like all other forests, those of Nigeria have a *direct* and *indirect* utility, and in appraising the economic worth of the forest estate due value must be given to both these considerations.

The average annual value of forest produce exported in the last five years is £227,000; the annual value of the internal trade is estimated at not less than £2,800,000. The latter figure is almost certainly an under-estimate.

Timber.—The merchantable forests cover about 45,000 square miles (including approximately 15,000 square miles of reserves). It is estimated that the gross timber increment is about 300,000,000 cubic feet per annum, but only about one-third of this is utilized. Much the greater part is used locally for building, etc., and exports (averaging over 2,083,438 cubic feet) exceed imports (averaging about 1,821,238 cubic feet).

The principal timbers exploited for export are mahogany, walnut, African whitewood and other hardwoods. There is room for expansion in this production as there are large foreign imports into the United Kingdom, but development will meet with several difficulties. Any assurance of permanent supplies is hampered by the agricultural practice of shifting cultivation, involving the destruction of forest. Freight charges, both within Nigeria and between the Colony and the United Kingdom, represent a very large percentage of the cost of the timber. A full development will also require the establishment of a local trade in sawn timber; the Forest Department is drawing attention to the encouragement of this and to the proper antiseptic treatment of timber.

Wood fuel, charcoal, etc.—There is a large local consumption of wood as fuel, estimated at 100,000,000 cubic feet per annum. Of this about 2,000,000 is sold to mines, markets, etc. There are possibilities of increased utilization of charcoal, which is efficiently produced in native kilns, in connexion with producer gas stationary engines.

Minor Forest Products.—Exports of other forest products (excluding palm products and rubber, dealt with under Agriculture) on the average of the five years 1929-33 have been as follows:—

Type of Produce.	Quantity.	Exports.
		Value.
		£
Gum Arabio	6,239 cwt.	7,257
Gums, others	55 cwt.	132
Shea butter... ..	37 tons	1,311
Shea nuts	7,193 tons	54,841
Forest seeds, grains, etc.	8,621 cwt.	5,232
Forest nuts and kernels other than palm	53 tons	142
Edible oil seeds	—	2,970
Oils, vegetable and wood	17 tons.	531
Gutta-percha	63 cwt.	147
Piassava fibre	425 tons	7,854
Fibres, others	1 ton.	5
Ivory	7 cwt.	291
Total		£80,713

These are all wild products collected as more or less spare-time occupations and in most cases available in almost unlimited quantities.

Shea produce is collected almost entirely by women and children as a spare-time rural industry in the Northern Provinces and is not at present likely to develop much further.

Piassava fibre for the manufacture of street and stable brooms, &c., supplies the raw material of a similar rural industry in the south.

Gum arabic as an industry has recently been organized by the Forestry Department, and the result is that the output has increased from a value of under £900 in 1928 to £9,793 in 1933; this small boom also reacted favourably on other gums. The supply of gum arabic is limited by the geographical area in which suitable gum trees will grow but a fourfold or fivefold increase in present production is possible. Gum copal used to be exported to the extent of £4,000 worth annually; the export has now ceased.

Camwood used to be a large item of export but is now replaced on the home market by aniline dyes.

Beeswax is another material which used to be collected and exported to a value of £1,000 annually; there are large quantities of this material in the country.

Tanning materials are produced in substantial quantities for local use. They are not at present exported but the local Mangrove (*Rhizophora racemosa*) produces a bark equal to that of the Indian Ocean mangroves.

Steps are being taken to try to develop this trade, and sample consignments have recently been despatched to England. In addition to these consignments of bark, the Forest Utilization Officer has recently carried out several experiments in making tanning extract (*cutch*) from Mangrove (*Rhizophora racemosa*) some of the samples of this locally made *cutch* are now being tested locally, while others have been sent to England for testing. The extract can be very easily prepared, all the apparatus required being a kerosene tin, and given a reasonable price and co-operative marketing it is possible that this may become an important village industry in the mangrove areas, where such industries are as yet absent.

A series of Tan barks analyses carried out by the Philippine Cutch Company, a few years ago, in which Nigerian bark *inter alia* was tested gave the following interesting results:—

Nigerian bark: soluble tanning percentage = 27·10–27·68 per cent.		
	average = 27·39	”
Honduras bark: ..	percentage = 20·20	”
Seychelles bark: ..	” = 17·77–34·5	”
	average = 26·13	”
Indian bark: ..	percentage = 22·17	”

Other forest materials used largely in local trade and barter include dyes, fibres, cordage, gums, canes, resins, rubber, oils, and tallow and edible fruits and leaves of all kinds. These and other forest products are of very great importance in native economy although no exact money value can be placed upon them.

The number of persons employed in forest work of various kinds is shown in the following table, all the figures in which are only approximate.

	Value of material.	Number of people employed.
	£	
Timber Concessions	206,205	27,650
Other lumbering	194,620	9,850
Sylvan produce collectors	271,800	88,000
Firewood gatherers, Charcoal burners	1,250,000	40,000
Carpenters, etc., canoe manufacturers	600,000	8,000
Workers in minor forests produce, Cord-weavers, etc.	200,000	4,000
Tanners	154,000	17,000
Hunters	—	8,100
Other forest occupations	—	4,200
Total	£2,876,625	206,800

The forests have also an indirect value, less obvious but probably of little less importance than their direct value. The chief high forest areas (the rain and deciduous forests) occupy a position athwart the moisture-laden sea breezes of the summer months, and accordingly exercise a marked influence on rainfall, assist in maintaining stable relative humidity, upon the maintenance of which the agricultural crops of the country depend, and in preventing erosion and silting. The savannah forests exercise similar influences which although less in absolute intensity affect very much larger areas. In addition through the vast savannah and orchard forests there extend long "fingers" of deciduous forests closely following the stream beds and stretching many miles into the grasslands of the north; these afford not only protection for man, beasts and crops against extremes of weather and other natural conditions, but also supply numerous necessities of life to these northern rural communities in a part of the country, which, owing to the general living conditions, they could ill afford to do without.

A considerably increased and rapid programme of forest reservation is required in the Northern Provinces if protection is to be permanently secured against future ecological retrogression accompanied by prejudicial conditions, climatic and otherwise. In the south better progress in reservation has been made, and the proposals recently submitted in regard to timber trade development will have a beneficial indirect effect as well; in both north and the south, however, there is still much to be desired in this matter of extending the area under reserves.

3. ANIMAL HUSBANDRY.

In Nigeria the majority of the live stock are in the Northern Provinces, but there are considerable numbers of domestic animals in the Southern Provinces.

The number of cattle shown below represents only those on which *jangali* tax has been collected and cannot be taken as even an approximate census of the total cattle population.

	Northern Provinces.	Southern Provinces.	Cameroons.	Annual profit on.
	£ 45			£
Cattle	2,675,961	122,584	34,322	1,274,787
Sheep	1,773,710	467,743	30,725	189,348
Goats	5,166,265	783,831	62,506	449,497
Horses	190,141	1,372	241	162,255
Donkeys	536,713	20,751	2	185,821
Camels	2,185	—	—	2,786
Swine	52,652	20,000	6,505	39,578
Total Annual gross Profit				£2,304,072

These figures do not include the value of the hides and skins exported but these are given in the Trade returns, and in recent years total in value:—

1929.	1930.	1931.	1932.	1933.
£	£	£	£	£
929,416	874,822	725,666	625,623	624,777

In the annual gross profit are included sales for slaughter and other sales and consumption of butter and milk. These figures are obtained from various enquiries now being made in different parts of Nigeria where the marketing facilities, pastures, disease position, and other factors are extremely variable.

In the case of cattle the gross annual profit per hundred head of cattle is found to be approximately £45; in sheep 33½ per cent. of value, in goats 40 per cent. of value, in horses 20 per cent. of value, in donkeys 33½ per cent. of value, in camels 15 per cent. of value, in swine 100 per cent. of their value. The prices of all live-stock except poultry have dropped considerably in the past two years and the figures given for annual profit are based on the present valuation of animals in the local markets and do not represent their true valuation, especially in the case of cattle; female live-stock would not be sold (except in an emergency such as has happened in recent years) to obtain tax money. This also applies in the case of mares and other female breeding stock and is entirely caused by the difficulty of obtaining money in normal ways for payment of tax.

Recorded exports of animals and animal products excepting hides and skins are inconsiderable although recently an attempt has been made to develop an export trade in clarified butter fat (*Ghee*). A few animals were shipped to the Gold Coast but the main trade is from the Northern Provinces for consumption in the south.

A large number of cattle, sheep and goats enter Nigeria overland but it is not possible yet to give the exact number. However, when the new Ordinance for the control of trade cattle comes into force and when all animals will be compelled to enter Nigeria only through certain border inspection stations, accurate figures will become available.

Meat.—Meat enters largely into the dietary of the inhabitants of Nigeria and very large numbers of animals are slaughtered every year. At Kano, one of the largest Native markets in the Northern Provinces, some 120 oxen are slaughtered daily in addition to some 40 goats and 30 sheep. It is estimated that altogether during 1933 some 240,000 cattle were slaughtered in the Northern Provinces and approximately 200,000 exported to the south for slaughter. Of the cattle proceeding to the south 104,000 crossed the Jebba bridge on hoof—this bridge may be taken as the main gateway to the south for cattle journeying by road—and some 47,000 were railed from Kano and other stations. Another 60,000 cattle, it is estimated, reached the south by other routes.

The journey on foot from Kano to the main southern markets usually takes about two months and entails much economic loss both from loss of condition and from deaths en route.

As a rough calculation it may be stated that not more than 50 per cent. of the herds which are trekked reach their destination in the south. The main cause of this heavy mortality is trypanosomiasis infection.

The journey by rail from Kano to Lagos takes about 46 hours and a train solely for the transportation of slaughter cattle is run weekly. The railway authorities, who are now fully alive to the economic importance of this traffic, are making arrangements to incorporate watering and possibly also feeding facilities in the new cattle-trucks which are now being constructed. It is hoped that these facilities along with the recent reduction in freight rates will bring about an increase in the number of cattle railed to the south as it is only by utilizing this method of transportation that the present heavy losses which occur when cattle are trekked can be overcome.

Hides and Skins.—There is a large production of hides and skins, and a very important export trade. Particularly is this the case with regard to goat skins of which some 4½ millions were exported in 1933. The skins of Nigerian goats more especially of the red Sokoto variety are in great demand in overseas markets on account of their fine texture and grain which make them suitable for use in the manufacture of all forms of high-grade leather work.

Within recent years an extensive scheme for improving the flaying and drying of hides and skins has been in operation throughout the Northern Provinces and more recently also in one or two of the larger markets in the south under the supervision of the Veterinary Department and already a very considerable improvement in their general preparation has been effected. In consequence of their general high quality there has been a steadily increasing demand for Nigerian hides and skins despite the general trade depression. Unfortunately the prices realized for these products in 1933 were somewhat lower than those prevailing in the years immediately preceding. Drying sheds have been erected at all markets where any appreciable number of animals are slaughtered and all the skins and hides produced at these markets must be dried in these sheds. Each such market is allotted a distinct stencil mark which is applied by the local head-butcher or, in the case of some of the larger markets in Kano Province, by a specially-appointed native inspector. By means of this system of marking, which consists of a letter representing the Province and a numeral for the individual market in that Province, hides and skins that have been badly flayed and faultily prepared can be traced to their origin and steps taken to remedy the faults. In Kano Province a whole-time European inspector has been seconded from the Veterinary Department to the local Native Administration in connexion with this work. Hides and skins are not graded by the Government, but the local commercial firms grade them into classes according to quality and export them under various marks which are recognized by the overseas buyers.

Ghee.—There is a local production of ghee (clarified butterfat) among the Fulani, but the product is of such a low quality that it has no market value except for native consumption.

Last year the matter was taken up by the Veterinary Department and an attempt is being made to improve the quality of the native product and establish and develop a local and export trade.

Already the sales have increased from 10,000 lb. in 1932 to 26,753 lb. in 1933 and there is every indication that a large trade can be developed in this product both locally and overseas.

A ghee depot has been established at Vom—the headquarters of the Veterinary Department—and another more recently in Kano, where the butter is bought from the natives and converted into ghee. In order to obtain sufficient quantities of butter and also to tap the resources of the herds of the country over a wide area, butter-buying posts have been established in connexion with the Vom depot. These posts are under the charge of African personnel who have been trained to test each sample of butter for adulteration and general good quality before purchasing it.

From experience recently gained in the working of the existing depots there is no doubt that very large quantities of good butter are available for purchase in the wet season throughout the Northern Provinces, and it is no exaggeration to say that with this trade developed to its fullest extent something like 1,000 tons a year could be produced in Nigeria.

It is to be hoped that some commercial firm will take up this trade and develop it to their own benefit and to that of the cattle-owners in those areas where markets for their surplus butter and milk do not at present exist.

4. MINERALS.

A considerable amount of geological survey work has been done by the Geological Survey Department, formed in 1919; notably a survey of the tinfields which enabled unsuspected deposits to be opened up; surveys of the western and eastern railway areas; a detailed study of the coal area; and an investigation of the Minna-Birnin Gwari goldbelt. Latterly the Department has concentrated on the location and development of water in the more arid parts of the Northern Provinces and considerable success has been achieved in tapping underground water.

The principal minerals commercially produced are tin, coal, gold, silver, lead and zinc. Salt is exploited locally by native methods. Deposits of mica, lignite, limestone, iron and (possibly) oil exist but are not at present worked. Details are as follows:—

Tin.—The principal tin-mining area is in Bauchi, north of the Benue River and west of Bornu. Jos, the centre of the tinfields, is connected by light railway with the Lagos-Kano line and by a standard guage-line with Port Harcourt. Tin has been mined and smelted by natives for the past century or more, but the greater part of the production is now in the hands of European companies.

Output was formerly in excess of 10,000 tons of ore per annum, the maximum being in 1929 with 15,335 tons of ore, metallic content 10,734 tons, of a value of £2,183,551; but in 1931 Nigeria entered into an agreement with other important tin-producing countries to restrict production, in view of the low prices due to over-production. In 1933 the export was 5,216 tons of ore and the potential output is estimated at 13,000 tons. Further particulars of the Regulation Scheme will be found on page .

Practically the whole of the Nigerian ore is exported to the United Kingdom for smelting.

Coal is found in the neighbourhood of Enugu (151 miles from Port Harcourt) and that coal-field has at present been traced within an area of about 80 miles by 20 miles. Other considerable deposits probably exist. Only two mines, Udi and Iva, owned by Government, are at present worked and further prospecting is suspended as the potential output of these is over 1,200 tons per day and since operations started in 1915 they have met all local demands. In 1933 a total of 935,134 tons was mined.

The Nigerian Railway and Marine Department draw their entire supplies of coal from these mines. Sales are also made to the Gold Coast and to steamers calling at Port Harcourt or engaged in local transport.

Gold.—Very little systematic prospecting has been carried out and practically no ore reserves have been proved; 35,565 ounces were produced from 1914-1933 inclusive, 17,718 ounces being produced in 1933 and 17,631 ounces in the first six months of 1934. During the last few months an enormously increased amount of attention has been devoted to gold and the output now exceeds 2,500 ounces of bullion per month, at present prices valued at about £17,000. This increased attention is due largely to the present premium on gold, but also to the supplies of labour available as a result of restriction of tin mining. If the present conditions persist for some time the industry might become established on a sound basis, and the present rate of production might not be seriously curtailed even if the tin industry returned to full production.

Silver Lead. Lead-Zinc.—During 1931, 2,015 tons of silver lead-ore was exported from Zurak, containing an average of 125 ounces silver per ton; the output for 1932 dropped to 683 tons which contained about the same quantity of silver, it rose in 1933 to 979 tons. All this ore came from one shoot which now appears to be exhausted and the future of the property is problematical.

A deposit of lead-zinc at Abakaliki has been partially developed by Nigerian Base Metals Corporation, Limited, but owing to the low price of lead and zinc all work has been suspended.

Numerous deposits of these ores are known, but, owing to their isolation and resulting high cost of transport, are unlikely to be of any commercial value and consequently few have been seriously examined.

Mica.—Two small deposits are held under mining title from which a few tons yearly might be produced if prices improved. The mica found so far has been of indifferent quality.

Lignite.—Deposits are reported to be extensive and of good quality. The amount of capital required for development and plant is large thus necessitating a big output for profitable operation. Available markets for the products appear to be restricted and until there is an assured outlet for a reasonable quantity development is considered unlikely.

Oil.—The presence of oil in Nigeria is indicated by the bituminous deposit in the Southern Provinces but nothing has yet been proved.

Salt.—Apart from the Lake Chad area, which is too distant to compete with imported salt, only small deposits, exploited by the local natives, are known. Many of these have proved to be too poor to compete with the imported article and have been abandoned.

Limestone.—Several deposits have been investigated in connexion with projects for the local manufacture of cement but conditions appear to have been unfavourable.

Iron.—Extensive deposits of iron-ore occur in various parts of the country but all are reported to be too poor or too far from the coast to be of commercial value.

5. FISHERIES.

The coast, rivers, and creeks of Nigeria are well stocked with fish but at present no attempt has been made to develop their resources on a commercial scale. There is, however, a considerable native industry in catching and smoke-drying fish on the coast which are then traded in the inland markets where they command a higher price than the dried fish imported from Europe. The chief centres of these fishing activities are the coast round Lagos and at Tom Shot on the Calabar Estuary, though smaller fisheries exist along the entire coast line. There are no records of the number of people engaged in this industry nor of the value of the annual catch.

B.

1. FOODSTUFFS.

It is not possible to aver that Nigeria is self supporting as regards foodstuffs, but it is extremely likely that in the event of necessity arising it would be found that it was singularly independent of outside commodities.

Importations of foodstuffs are considerable but it is doubtful if any of them, with the exception of salt, are prime necessities although various communities now use them regularly. In order of importance and possible necessity the principal foodstuff importations are:—

Salt.—Imports remain fairly stable at about one million cwt. per annum. A large inter-tribal trade formerly existed in locally-won salt, and deposits are to be found in several parts of Nigeria. It is highly probable that if imported salt became rare this old trade would revive.

Fish.—During the past five years importations have been 352,000; 329,000; 167,000; 282,000; 182,000 cwt. This fish is largely consumed in the Eastern Provinces where meat is very scarce, although a market is also found over a large part of Nigeria. But the native certainly existed without this fish in the past, and there is little doubt that local fisheries could be made to produce a great deal more than they do at present.

Rice.—For the last five years importations have been as follows:—221,000; 257,000; 172,000; 152,000; 126,000 cwt. Spread over the population of Nigeria these quantities are negligible. Rice is grown in parts of Nigeria and local production could be increased.

Flour.—These imports are too small to warrant the assumption of necessity. From 84,000 cwt. in 1928 they have declined to 56,000 cwt. in 1933.

Milk.—Importations of preserved milk have averaged a million pounds in weight for the past five years, but it is probable that the non-native population consume 75 per cent. of this.

Sugar.—In the past five years importations have been:—105,000; 117,000; 57,000; 79,000; 68,000 cwt.

2. INTERNAL TRADE AND PRODUCTION.

The main stream of overseas trade is in the hands of non-native individuals or firms, while the innumerable tributaries of the produce trade, which unite to form the exports, and the minor branches into which imported merchandise is directed for sale in thousands of markets and the vast net-work of local trade, are almost entirely in the hands of native middlemen, market-men, and women.

The producer, if we except tin production, is always, and the consumer, except for a few special articles of imported goods, nearly always, a native. In consequence the bulk of the trade of Nigeria, however little this aspect of it is reflected in trade statistics, is internal trade.

This trade is, for the greater part, trade in agricultural produce, as is to be expected in a country practically all of whose foodstuffs are grown locally. The data collected for the World Agricultural Census of 1930 indicate that, excluding palm products and much edible fruit and vegetables like coconuts, plantains, potatoes, pumpkins, and so forth, the annual yield of Nigeria is over 12 million tons. This alone would provide over 3½ lb. of food *per diem* for each man, woman, and child.

In addition, the supplies of meat in the north and fish in the south are considerable. Thus, with over 3 million cattle and 9 million sheep and goats the annual herd-increase, in a normal year, exceeds 300,000 cattle and 2,700,000 sheep and goats.

This will give about 5 lb. of beef and just under 4 lb. of mutton per head of population *per annum*: this is not very much compared, say, with the United States' *per capita* consumption of 67 lb. of beef *per annum* (1911-1921), but it is not negligible.

The quantity of fish consumed cannot be estimated: but, indirectly, the beneficial effects of a fish diet are emphasized by the observations of the Southern Provinces Medical Census Officer that among persons of 40 years and over the proportion of poorly nourished persons is very much lower among the Ijaws of the Creek area than among the inland Yorubas of Abeokuta and the Forest tribes of the Cameroons. The figures are:—

Tribe.	Percentages of poorly nourished persons over 40.	
	Male.	Female.
Cameroons Forest Tribes ...	30	48
Yorubas	26	49
Ijaws	16	23

Below the age of 40 the proportion of poorly nourished persons in the areas observed never exceeds 6 per cent. The sacrifice of the old for the young and of the female above reproductive age to the male, the latter a well-marked feature of Indian economic life, is clearly indicated.

VI.—Industry.

No industries, in the accepted sense of the word, are established in Nigeria. There is a soap factory which employs some 70 people and which has a fair local, and small export, trade. A bulk-oil petroleum plant is established and employs 120 people for the tinning and casing of oil for local trade and for re-export. Two soda-water factories keep about sixty men in work, and a cigarette factory, which manufactures from imported and locally grown tobacco, employs a hundred hands.

Bulking plants for the treatment of palm oil for export in bulk exist at Lagos, Port Harcourt, Koko, Degema, Burutu, and Calabar.

Of local arts and crafts the most important is that of weaving in the Oyo and Kano Provinces, the cotton cloth from these countries finding a ready sale locally and even in the neighbouring French Colonies. Kano is also noted for its brass and silver work and for its coloured leather work. Brass workers are to be found in Bida, Benin, and Calabar, their products having a local sale. Pottery, mat, and basket making are general all over the country but are confined in their range to meet domestic demands.

VII.—Other Economic Activities.

There is no entrepôt trade in Nigeria, and there is no tourist traffic.

VIII.—Communications.

1. WATERWAYS.

These are of primary importance to the life of Nigeria. There is a wonderful network of rivers and connecting creeks and on these 185 self-propelled craft are at present operated by commercial interests. In parts of southern Nigeria water transport is the only means of communication.

The Niger is navigable by sea-going vessels via the Forcados Branch of its delta as far as Warri which is 26 miles from the port of Forcados. There is a weekly mail launch service between Burutu and Baro, a distance of 407 miles. A fortnightly mail launch service runs between Lagos and Sapele, a distance of 227 miles, which in turn is connected at Koko with the Burutu-Forcados-Koko service (60 miles). From Lagos there is also a weekly service to Porto Novo which is 67 miles away, and just over the boundary between Nigeria and Dahomey.

The Upper Niger is navigable by shallow draught stern-wheelers as far as Jebba which is 540 miles from the sea.

At Lokoja, some 340 miles from the Delta, the Niger is joined by its chief tributary the River Benue. Communication is maintained between Lokoja, Makurdi, and Yola (near the boundary with the French Cameroons) by means of shallow-draught vessels, a total distance of 467 miles.

The Imo and Bonny Rivers with their respective ports of Opobo and Port Harcourt, which are used by ocean-going vessels, are the natural outlets for the central Southern Provinces, Port Harcourt being the second most important port in Nigeria. A mail launch service is maintained between Port Harcourt, Degema, and Nembe, some 90 miles.

Further to the eastward, the Cross and Calabar Rivers are available for transport purposes. Ocean steamers go as far as Calabar, which is situated 30 miles from the sea. A regular mail launch service is maintained between Calabar and the stations on the Cross River. During the high water season this service is extended as far as Ikom, a distance of 200 miles. All mail launch services are Government operated.

The British Cameroons are served on the western side by the Akwayafe and Meme Rivers. Ikang can be reached by ocean-going vessels via the Akwayafe River, whilst light craft proceed up to N'dian which is 40 miles from the sea. The Meme River affords a light draft transport up to Bonge, a distance of 45 miles approximately. On the eastern side of the Cameroons, the Tiko River gives access to the port of Tiko which is situated some 20 miles up river and is used by ocean-going vessels.

From the foregoing, it will be seen that there is water communication between Jebba, in the extreme north, and between Yola in the extreme east and the southern sea-board. Again, it is possible to travel by inland waters from Dahomey in the East to the boundary of the British Cameroons.

2. RAILWAYS.

The Nigerian Railway consists of two main trunk lines converging at Kaduna and totalling 1,905 route-miles of single line. It is Government owned.

(a) *Western Line.*—This comprises a main line from Lagos (Iddo and Apapa stations) to N'Guru, a distance of 847 miles, and passing through the important towns of Abeokuta, Ibadan, Oshogbo, Ilorin, Kaduna, Zaria, and Kano. The line crosses the River Niger at Jebba by two bridges having a length of 1,795 feet. Branch lines run from Ifo Junction to Idogo, 27 miles; from Minna to Baro, 111 miles; from Zaria to Kaura-Namoda, 137 miles; from Zaria to Jos, 134 miles. The gauge of the Zaria-Jos branch is 2 feet 6 inches, the remainder of the line being 3 feet 6 inches.

(b) *Eastern Line.*—The Eastern main line commences at Port Harcourt on the Bonny River and effects a junction with the Western line at Kaduna. From Kafanchan a connecting line runs to Jos. The line crosses the River Benue at Makurdi by a bridge 2,584 feet long. This is a combined rail and road bridge.

Further expansion of the system has not been neglected and during recent years extensive reconnaissance and traffic surveys have been carried out in promising areas. The principal project involves what would be practically a new main line from Lafia to Lake Chad, the estimated length of this line being 488 miles. A branch line to Sokoto has also been projected but it is evident that expansion must now wait on prosperity.

The lines are laid with varying weights of rail; it was originally considered that 50 lb. rails would carry all the probable traffic, but later experience showed heavier track to be necessary and 55, 60, and 80 lb. rails are now laid for the principal sections.

The rolling stock is good and adequate for the traffic.

Well-appointed passenger trains run between Lagos, Kano, and Jos three times a week and also in connexion with the homeward and outward mail steamers. These trains have sleeping and dining cars. Trains with restaurant cars attached also run regularly between Port Harcourt and Kaduna. Good local services are also maintained. It is now possible to travel from Lagos to Port Harcourt, 1,135 miles, with but one change of carriage and with sleeping and dining-car accommodation throughout. The passenger fares are based on 4d. per mile, 1st class; 2d. per mile, 2nd class; and ½d. per mile, 3rd class.

Goods rates are based upon a taper, i.e., the basis per ton mile decreases as the distance increases. The exception to this is the first-class rate applying to minerals which is 1d. per ton mile throughout. The rate on cotton goods, provisions, wines, and spirits, etc., equals 3-14d. per ton mile from Lagos to Kano, whilst African foodstuffs are carried at 1-13d. per ton mile. Special rates are quoted for many commodities.

Subsidiary Motor Services.

The railway owns a fleet of motor lorries and tractors, of a total capacity of about 97 tons. The lorries are fitted with governors, limiting speed to 13-15 miles per hour, and are all English-built machines, designed for heavy work, and capable of running over bad roads.

Motor headquarters are at Zaria, where repair shops are situated, and vehicles are stationed at places as far apart as Nguru mile 847 (main line) and Gusau, Kaura Namoda, and Funtua, etc., on the Gusau branch. They cover an enormous area of country, running Nguru-Maiduguri, Gusau-Sokoto-Jega, Birnin Kebbi-Sokoto-Kworre, Gusau-Anka-Jega, Gusau-Kaura Namoda, Tara-Kaura Namoda, Katsina-Faskari-Funtua-Gangara, Karadua-Kankara, and Zaria-Gangara.

Rates are quoted per ton, per vehicle, either by time or day, and the ordinary goods rates are cheap for the class of work done, ranging from 5d. to 6d. per ton mile, according to distance and load of lorry.

Goods are booked through from motor stations to rail stations and ports, at reduced through rates in either direction. In Sokoto, for instance, a way-bill is issued for tonnage loaded at firms' stores and this covers, in one inclusive payment, motor transit, tranship to rail, rail transit to port, off-loading and one week's storage at port, and placing on board—in other words rate at Sokoto, 861 miles from Apapa, is f.o.b. Apapa.

Although 1933-34 was a bad year for trade, railway motors ran 250,696 vehicle miles, and conveyed 694,399 loaded goods ton miles.

3. ROADS.

The roads maintained by Government may be classified as below:—

- (i) Roads surfaced with tar or bituminous preparation, 129 miles.
- (ii) Earth and gravelled (laterite, quartz, etc.) roads, 3,498 miles.
- (iii) In addition, some 190 miles of township roads are maintained, of which 27 are bituminous or tar surfaced.

About 4,300 miles of all-season, and 7,500 miles of dry-season, roads are maintained by Native Administrations.

Through-road communication over long distances exists in Nigeria. The main route from Lagos to the north is open to Jebba on the Niger (292 miles), and passes through the important towns of Abeokuta, Ibadan, Oyo, and Ilorin. There is a route from Lagos to the outskirts of Calabar—the old capital of Southern Nigeria—a distance of 600 miles. This route, after crossing the Niger by a mechanically operated ferry, bifurcates at Onitsha, and one branch goes to Enugu, the administrative centre of the Southern Province. Enugu is connected by road to Port Harcourt on the Bonny River, which is navigable for ocean-going vessels. The distance is about 180 miles. The older roads of the South-Eastern Provinces give very complete intercommunication. The important towns of Sokoto, Zaria, Kano, Katsina, Jos, and Bauchi in the Northern Provinces are connected by all-season roads and a dry-season road runs from Bauchi to Yola, via Numan. From Potiskum a dry-weather road connects Bauchi with Maiduguri, Dikwa, and the shores of Lake Chad. The journey by motor has been made several times from Lake Chad to Khartoum. The journey across the desert from Sokoto or Kano to Algiers has also been made. The French Government operates a service between Niamey, Gao, and Algiers, and facilities are given to join this from Kano. The following summary showing the main transport routes of Nigeria with reference to the carriage of commodities has been compiled by the Government Statistician:—

SUMMARY OF WATERWAYS, RAILWAYS, AND ROADS SHOWING MEAN MINIMUM DISTANCE OF FARMS FROM METALLED ROADS AND/OR "NAVIGABLE" WATERWAYS AND/OR RAILWAYS.

Province.	Area of Province L	Mileage of Metalled Roads R	Mileage of "Navigable" Waterways W	Mileage of Railway L	Total Mileage "Main" Transport Lines. R + W + L	Mean Minimum Distance from Main Transport Lines (1) $\frac{8}{27} \times \frac{L}{R + W + L}$
Colony ...	1,381	55.75	142	14	211.75	1.9
Abeokuta ...	4,266	334.50	—	116	450.50	2.8
Benin ...	8,627	955.00	90	—	1,045.00	2.4
Calabar ...	6,331	679.50	433	—	1,112.50	1.7
Cameroons ...	16,581	330.00	34	—	464.00	10.6
Ijebu ...	2,456	275.00	10	—	285.00	2.6
Ogoja ...	7,529	166.00	217	—	383.00	5.8
Ondo ...	8,211	405.75	62	—	467.75	5.2
Onitsha ...	4,937	702.00	32	90	824.00	1.8
Owerri ...	10,374	1,095.25	616	109	1,820.25	1.7
Oyo ...	14,216	669.00	—	114	783.00	5.4
Warri ...	5,987	328.00	347	—	675.00	2.6
Adamawa ...	35,001	425.00	295	—	720.00	14.4
Bauchi ...	25,977	1,130.50	—	—	1,130.50	6.8
Benue ...	28,082	313.00	210	177	700.00	11.9
Bornu ...	45,900	621.00	—	6	627.00	21.7
Ilorin ...	18,095	301.50	114	88	503.50	10.6
Kabba ...	10,577	534.00	177	—	711.00	4.4
Kano ...	17,602	936.00	—	182	1,118.00	4.7
Niger ...	25,349	1,315.00	121	328	1,764.00	4.3
Plateau ...	10,977	545.25	—	168	713.25	4.6
Sokoto ...	39,940	1,142.75	135	66	1,343.75	8.8
Zaria ...	24,278	1,358.75	—	432	1,796.75	4.0

(1) Assumes peripheral roads of $\frac{1}{4}$ the internal road system.

Note:—"Navigable" waterways means those waterways which can be navigated by a mechanically propelled craft.

4. HARBOUR FACILITIES.

Accommodation for ocean-going vessels is provided as follows: Maximum bar draughts are given and draughts alongside wharves where such exist:—

Lagos.—Bar draught 26 feet.

Accommodation.	No. of ships.	Draught.
Customs Wharf ...	3	24 feet
Apapa Wharf ...	4	25 "
Marina Buoy... ..	4	24 "
Ijora Wharf ...	2	18 "
Bulk Oil Wharf ...	1	25 "
United Africa Co.'s Wharf ...	1	25 "
Pool Buoy ...	2	25 "
Pool Anchorage ...	3	19 to 22 feet
Total ...	20	

Forcados Estuary.—The draught of vessels using the Forcados estuary ports is limited to the Forcados bar draught, which is 16 feet. These ports are Forcados, Burutu, Warri, Koko, and Sapele.

Forcados.—Vessels cannot berth alongside at the port of Forcados, but there is anchorage room for several vessels.

Burutu.—There is accommodation for three vessels alongside the wharf belonging to the United Africa Company, the draught at low water being from 11 to 17 feet. Good anchorage is available.

Warri.—Two vessels can lie alongside the private wharves of Messrs. John Holt & Company.

The Government jetty can accommodate a small vessel.

A Government mooring buoy provides mooring accommodation for two vessels, i.e., stern moorings to the buoy and with their own anchors down.

Koko.—Anchorage exists for three or four vessels.

Sapele.—Good anchorage for three or four vessels.

Akassa.—The recommended draught for Akassa is 14 feet. Good anchorage for several vessels exists close to the wharf.

Bonny Estuary.—The recommended draught over Bonny bar is 21 feet. There is no berth at Bonny, but practically unlimited anchorage exists. This estuary leads to Buguma, Degema (Abonema), and Port Harcourt.

Buguma.—The draught is limited by the depth of the Cawthorne Channel which has a maximum of 18 feet. Three vessels may anchor here.

Abonema.—Draught limited by Cawthorne Channel to 18 feet. Good anchorage for several vessels and two vessels can berth at the wooden jetties belonging to the United Africa Company and one at the Bulk Oil Wharf which is a modern erection.

Port Harcourt.—At the main wharfage there is accommodation for four vessels with a draught of 24 feet. One more vessel can berth at the coal transporter and one at the old coal tip. Draught 20 feet.

Two small vessels can lie in the Pool above Port Harcourt and one at the Quarantine Buoy, three miles down river.

There is no anchorage room off the port.

Though vessels can load to 24 feet at the wharves, the draught on Bonny Bar limits them to 21 feet.

Opobo.—The recommended draught over Opobo Bar is 13 feet.

Two private wharves, one of them being a bulk oil wharf, provide berths for two ships.

Anchorage exists for three or four vessels within convenient reach of the port.

Calabar.—Recommended maximum draught is 20 feet.

The small Government wharf can berth one vessel with draught not exceeding 16 feet.

A Government mooring buoy provides a swinging berth for another and there is anchorage room for about three ships, draught not exceeding the 20 feet maximum.

Victoria.—There is anchorage room for about four vessels within easy distance of the Government jetty. Deep water exists suitable for any vessel trading to the West Coast.

Tiko.—The recommended draught for vessels visiting Tiko is 16 feet. This restriction is due to the vessels having to cross Bimbia Bar.

One vessel can berth alongside the African Fruit Company's steel wharf.

Notes:—

Ample warehouse accommodation exists at the Lagos, Apapa, and Port Harcourt wharves.

Warehouses are provided at all other ports.

Light and buoyage dues are payable at all ports for every ship of a registered tonnage of 100 tons.

Berthage dues, berthing dues, mooring-buoy dues, towage dues, pilotage dues, and anchorage dues are also payable in respect of shipping.

Harbour dues are payable for passengers and cargo.

The total number of steam and motor vessels of each nation entered at ports in Nigeria in 1933 was as follows:—

Nationality of Vessels.	Entered.					
	With Cargo.		In Ballast.		Total.	
	No.	Tons net.	No.	Tons net.	No.	Tons net.
British	290	642,634	78	79,534	368	722,168
German	105	148,393	73	24,144	178	172,537
French	60	203,932	4	423	64	204,355
Dutch	37	73,361	26	170	63	73,531
Italian	33	101,059	5	14,164	38	115,223
American	35	115,333	2	6,754	37	122,087
Swedish	18	39,971	3	5,454	21	45,425
Other	5	7,502	5	6,475	10	13,977
Total	583	1,332,185	196	137,118	779	1,469,303

Docks and Slipways.

There are three Government floating docks available for use, two of which are situated at Apapa Dockyard (Lagos) and the other at Port Harcourt.

At Lagos there is also a floating dock owned by the Nigerian Dry Dock and Engineering Company, Limited, which has a lifting power of 2,700 tons and which can take vessels with a maximum draft of 18 feet.

At Calabar the United Africa Company have a dry dock which can accommodate a vessel up to 600 tons displacement.

Government slipways are at Lagos, Forcados, and Calabar and at the latter port there is also a Government slip leased to Elder Dempster Lines, Limited, which is suitable for vessels up to 120 tons displacement.

Shipping Services Maintained.

The vessels of the African Steamship Company and the British and African Steamship Company run regularly and at frequent intervals between England and Nigeria. Both these companies are under the management of Elder Dempster Lines, Limited, and constitute one service. The mail steamers sailing from Liverpool run fortnightly, and on the outward passage call regularly at Freetown (Sierra Leone), Takoradi and Accra (Gold Coast), Lagos, and Port Harcourt or Calabar (Nigeria). The vessels on the Calabar mail service call at Victoria (Cameroons) under British mandate.

Calls are made every four weeks at Funchal (Madeira), Bathurst (Gambia) and Monrovia (Liberia). The terminal port of call is Port Harcourt and Calabar on alternate voyages. A branch steamer plies between Lagos, Forcados, and Port Harcourt in connexion with the mail vessel operating the Calabar-Victoria service. On the homeward passage a call is made at either Las Palmas or Teneriffe (Canary Islands) instead of at Madeira.

Monthly services are also maintained by the Woermann Linie between Southampton and Nigeria, the Holland West Afrika Lijn between Havre and Nigeria, and the Fabre-Fraissinet Line between Marseilles and Nigeria.

A regular service between Bordeaux and Porto Novo (Dahomey) is maintained by the Chargeurs Reunis. Regular launch services through the creeks between Lagos and Porto Novo and between Lagos and Epe are maintained by Messrs. Elder Dempster Lines, Limited, the Woermann Linie, and the Holland West Afrika Lijn.

Airways.

There are no regular airway services to Nigeria. Landing grounds exist at Lagos, Ilorin, Minna, Jos, Kaduna, Kano, Katsina, Bauchi, Yola, and Maiduguri, but their condition is indifferent and ample notification should be given by aviators who wish to make use of them.

IX.—Tariff.

The Customs tariff of Nigeria is purely a revenue tariff. It has been designed to impose as little burden as may be possible on the poorer classes and only luxury items are dutiable at high rates.

The tariff is mainly specific in character, all articles under Group 1, i.e., food, drink, and tobacco, being included at specific rates whilst petroleum, nearly all woven goods, and sundry minor articles are also scheduled similarly. In 1933 the percentage of specific duties to the total revenue was 92.

Ad valorem duties are imposed on various miscellaneous articles, the rates being 15 per cent. or 10 per cent. assessable on the purchase price in the country of purchase.

Only articles especially scheduled are dutiable, and even then a free list grants exemptions when these articles are imported under certain conditions. The exemptions are mainly in respect of Government importations; importations deemed to be of general benefit to Nigeria; essential motor accessories; implements, instruments, and tools used in various professions and trades.

Imperial preference is not in operation because the country is prevented from granting it by the provisions of the Anglo-French Convention of 1898.

X.—Trade Representatives.

The Comptroller of Customs is Imperial Trade Correspondent for the Board of Trade and should be approached on all trade matters by interested firms. Nigeria has no trade representative overseas nor are there any overseas representatives in Nigeria.

SIERRA LEONE.

I.—Situation, etc.

The territory comprising the Colony and Protectorate of Sierra Leone is about the size of Ireland (27,925 square miles) and lies between latitude 6° 55' and 10° 00' north and longitude 10° 16' and 13° 18' west. The portions administered strictly as Colony are the Sierra Leone Peninsula, Tasso Island, the Banana Islands, York Island, and the township of Bonthe in Sherbro Island. The total area amounts to some 256 square miles.

Freetown, the capital, is situated at the northern extremity of the Peninsula on a fine natural harbour which affords good anchorage close to the shore for the largest ships. The greater portion of the Peninsula is mountainous and well wooded, the conical peaks, of which the highest is Picket Hill (2,912 feet), being visible for great distances at certain seasons of the year.

The Protectorate (27,669 square miles) is well watered by a network of rivers and streams, the general direction of flow being from north-east to south-west. Most of the rivers have wide estuaries; and, although none of them is navigable for ocean-going steamers, several of them provide useful waterways for lesser craft, particularly during the wet season.

Excluding the mountainous peninsula, the Colony and Protectorate as a whole may be generally described as flat and low-lying in the south and west and broken and elevated in the north and east, where the Loma and Tingi mountains rise to over 6,000 feet. The nature of the vegetation varies considerably. South of latitude 8° 30' north dense bush country (originally tropical forest) is as a rule encountered; but this gives place as one travels northward to more open or "orchard bush" country.

The seasons may be divided into wet and dry, the former commencing in May and lasting until October. The rains are as a rule ushered in during the latter part of March and April by a series of tornadoes. Similar phenomena, though as a rule of a less violent nature, are experienced toward the end of the wet season. The dry north-easterly "Harmattan" wind usually blows at intervals during the December-February period, visibility being thereby greatly restricted owing to the fine dust carried down by it (believed to be from the Sahara). During this period hot days and cool nights are the rule.

The shade temperature at Freetown varies during the year from about 65° to 95° Fahrenheit. The average maximum and minimum may be placed at 87° and 74°, respectively.

The average annual rainfall at Freetown over a forty-year period has amounted to 452 inches. July and August are as a rule the wettest months.

Land in the Colony belongs to the Crown, but considerable portions have been alienated and prescriptive titles have been acquired. It is therefore difficult in many cases to ascertain title to land without recourse to legal procedure.

Land in the Protectorate is held by the Tribal Authority of each chiefdom on behalf of the people of the chiefdom.

II.—Population.

The population at the census of 1931 was:—

	<i>Colony.</i>	<i>Protectorate.</i>	<i>Total.</i>
British	293	142	435
Other Europeans	108	55	163
Americans	19	34	53
Asiatics	444	772	1,216
African non-natives	33,775	3,265	37,040
African native tribes	61,783	1,667,790	1,729,573
	<u>96,422</u>	<u>1,672,058</u>	<u>1,768,480</u>

The estimated population of the Colony and Protectorate on 31st December, 1933, was 1,834,000.

The Colony in its early years was used as a home for Africans destitute in and about London and later for liberated African slaves. The descendants of these people (included above as "other African natives") still form a substantial proportion of the population of the Colony itself, but the vast majority of the Protectorate inhabitants are indigenous Africans living in tribal communities. Immigration and emigration are not now of any great importance in the economic life of Sierra Leone. There is constant movement between the Colony, Protectorate, and neighbouring territories, but no considerable net inflow or outflow. The European population are of course not permanent residents and the Asiatic population consists very largely of Syrians engaged in trade.

Of the total population of the Colony proper, 96,422, Freetown, the administrative capital of both Colony and Protectorate, contained 55,360 persons. The occupations of the Colony are therefore predominantly commercial, administrative, and industrial. Elsewhere much the greatest part of the population is engaged in agriculture.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the pound, maintained at par with sterling by the West African Currency Board which issues and redeems currency in the four British West African Colonies against deposits and withdrawals of sterling in London. The media of circulation consist of £1 and 10s. notes, and alloy and nickel-bronze coins of 2s., 1s., 6d., 3d., 1d., and $\frac{1}{2}$ d., issued by the Board.

2. *Banks.*—Bank of British West Africa, Limited—two branches and three Agencies. Barclays Bank (Dominion, Colonial, and Overseas), Limited—one branch.

3. *Post Office Savings Bank.*—Head Office and 20 Agencies. At the 31st December, 1933, there were 9,523 depositors and the liability of the Bank was £64,726.

B.—PUBLIC FINANCE.

1. *Public Debt.*

At the 31st of December, 1933, the total debt outstanding was £2,141,273. In April, 1934, this was reduced to £1,718,259 by the repayment of the 1904 $3\frac{1}{2}$ per cent. loan of £729,848 and the issue of a new loan of £306,834 at 3 per cent. The charges, as provided in the Estimates for 1934, were:

Interest and management £74,465 (including £45,529 borne on Railway Estimates).

Sinking fund contributions £27,456 (including £13,021 borne on Railway Estimates).

Particulars of the loans outstanding at the 31st of December, 1933, are given in the Appendix.

2. *Revenue.*

(A) *Analysis of Revenue (on basis of Estimates for 1934).*

Self-Balancing Departments.

	Revenue.	Expenditure.
	£	£
Broadcasting	900	1,067
Motor-bus service	2,700	3,408
Post Office	15,935	15,472
Electrical Department	13,050	8,761
Railway	140,060	195,197
	<u>£172,645</u>	<u>£223,905</u>

Net deficit £51,260.

Colonial Development Fund.

	Revenue.	Expenditure.
	£	£
<i>Loans on Repayment.</i>		
Marampa Concession (Sierra Leone Development Co., Ltd., £500,000)	50,000	50,000
<i>Grants-in-Aid.</i>		
For engagement of an additional Assistant Conservator of Forests	7	7
Canalization of streams and completion of drainage of Freetown	1,253	2,990
	<u>£51,260</u>	<u>£52,997</u>

Net deficit £1,737.

General Revenue.

	£	Per cent.
(1) Customs	386,000	66.0
(2) House and Poll Taxes	82,750	14.2
(3) Fees, etc.	34,814	5.9
(4) Licences, Port Dues, Rent and Interest and Miscellaneous Revenue	81,039	13.9
	<u>584,603</u>	<u>100</u>
Revenue of self-balancing Departments (excluding Railway) set off against Expenditure	32,585	
Receipts from Colonial Development Fund	51,260	
	<u>£668,448</u>	

(B) *Analysis of Import Duties, 1933.**Amount of duty collected on articles imported from:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	£	£	£	£
Class I	39,378	6,755	111,077	157,210
Class II	106	190	574	870
Class III	45,547	7,867	50,508	103,922
	<u>85,031</u>	<u>14,812</u>	<u>162,159</u>	<u>262,002</u>
Parcel Post				5,039
Total				<u>267,041</u>

3. *Analysis of Expenditure (on basis of Estimates for 1934).*

	£	Per cent.
(1) Deficit on self-balancing Departments (See 2(A)) ...	51,260	9·0
(2) Debt Charges	43,371	7·6
(3) Administration	228,890	40·1
(4) Economic Development	41,059	7·2
(5) Social Services	113,639	19·9
(6) Defence	37,862	6·6
(7) Pensions and Gratuities	54,603	9·6
	<u>£570,684</u>	<u>100</u>
Expenditure of self-balancing Departments (excluding Railway) set off against Revenue	32,585	
Colonial Development Fund Expenditure	52,997	
	<u>£656,266</u>	

4. *Reserve Funds, etc.*

At the 31st December, 1933, the following reserve funds and other important liquid assets were held by the Government:—

- (i) Reserve Fund £29,928.
- (ii) Surplus Funds Invested £39,345.
- (iii) Loans to Freetown Municipality £20,591.

5. *Grants-in-Aid.*

No grants-in-aid of ordinary expenditure have been received or requested from the United Kingdom Exchequer in recent years but the following assistance has been received from the Colonial Development Fund and the Empire Marketing Board:—

	1930.	1931.	1932.	1933.
	£	£	£	£
1. Colonial Development Fund:—				
(a) Sierra Leone Development Co., Ltd. (Marampa Concession).	—	175,000	175,000	72,500
(b) New Passenger Jetty, Freetown	7,400	—	—	—
(c) Canalization of streams and completion of street drainage, Freetown.	6,000	2,577	—	—
(d) Grant for the engagement of an additional Assistant Conservator of Forests.	—	—	175	328
2. Empire Marketing Fund:—				
(a) Newton Fruit Farm	684	1,507	1,522	750
(b) Masanki Oil Palm Plantation	1,500	750	—	—
Total	<u>£15,584</u>	<u>£179,834</u>	<u>£176,697</u>	<u>£73,578</u>

(1)—(a) Loan to the Colonial Government which is re-lent to the company. Total loan authorized £500,000, balance available in future years £77,500.

(1)—(c) Original grant authorized £26,000; reduced to £22,795 on modification of Scheme; balance payable in future years £14,218. Work on this scheme was temporarily suspended for years 1932 and 1933.

(1)—(d) Total grant authorized £515, amount required £503.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.*</i>
			£	£	£	£
1913	...	...	230,091	253,882	1,146,886	1,630,859
1930	...	...	337,376	196,802	591,951	1,126,129
1931	...	...	396,532	62,952	410,238	869,722
1932	...	...	370,356	56,628	505,789	932,773
1933	...	...	434,700	54,501	294,742	783,943

* Exclusive of Ships' Stores the value of which was as follows:—

						£
1913	...	...	...	...	...	100,393
1930	...	...	...	...	...	89,917
1931	...	...	...	...	...	53,891
1932	...	...	...	...	...	48,819
1933	...	...	...	...	...	39,088

(ii) *Domestic Exports by Classes, 1933.*

To			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Class V.</i>	<i>Total Merchandise</i>
			£	£	£	£	£	£
United Kingdom	...	...	8,729	326,464	25	—	84,010	419,228
Gambia	...	...	1,165	22,675	311	—	—	24,151
Nigeria	...	...	186	18,890	5	—	—	19,081
Rest of Empire	...	...	464	1,894	3	—	—	2,361
<i>Total Empire</i>	...	...	10,544	369,923	344	—	84,010	464,821
Germany	...	...	920	157,344	9	—	—	158,273
Holland	...	...	262	84,881	—	—	—	85,143
United States of America	...	...	8,117	10,192	—	273	—	18,582
Poland	...	...	—	17,894	—	—	—	17,894
Other Foreign Countries	...	...	1,782	7,370	65	—	—	9,217
<i>Total Foreign Countries</i>	...	...	11,081	277,681	74	273	—	289,109
Ships' Stores	...	...	117	—	171	—	—	288
GRAND TOTAL	...	...	21,742	647,604	598	273	84,010	754,218

(iii) *Principal Domestic Exports, 1933.*

Class I—	Article.		<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of destination with amounts in £'000.</i>
Ginger	...	...	30,902 cwt.	16,544	United States of America (8), United Kingdom (7).
Class II—					
Palm Kernels	...	...	64,083 tons	472,824	United Kingdom (217), Germany (151), Holland (84), Poland (18), United States of America (14).
Diamonds	...	...	26,901 carats	73,266	United Kingdom (all).
Kola Nuts	...	...	36,236 cwt.	43,656	Gambia (21), Nigeria (19),
Palm Oil	...	...	1,617 tons	17,637	United Kingdom (15), Gambia (2).
Piassava fibre	...	...	3,500 tons	30,108	United Kingdom (13), United States of America (7), Germany (6).
Class V—					
Raw Gold	...	...	14,975 oz. troy	84,010	United Kingdom (all).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
			£	£	£	£
1913	...	...	1,144,875	176,018	456,700	1,777,593
1930	...	...	783,812	46,878	593,485	1,424,175
1931	...	...	722,792	22,853	395,966	1,141,611
1932	...	...	822,155	67,327	358,864	1,248,346
1933	...	...	489,233	86,878	249,758	825,869

N.B. For the years 1913 to 1931 and the first four months of 1932, the imports were recorded by "countries of consignment"; since then goods have been recorded by "countries of origin".

(ii) Imports by Classes, 1933.

			Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
			£	£	£	£	£
<i>From :—</i>							
United Kingdom	...	...	78,641	29,238	351,600	25,901	485,380
India	...	...	1,838	—	45,792	—	47,630
Canada	...	...	20,219	1,298	1,550	—	23,067
Rest of Empire	...	...	11,802	3,357	996	26	16,181
<i>Total Empire</i>	...	...	112,500	33,893	399,938	25,927	572,258
United States of America...	...	...	49,479	3,383	37,263	—	90,125
Japan	...	...	150	—	42,796	—	42,946
Germany	...	...	13,562	185	19,770	3	33,520
France	...	...	5,496	33	10,592	—	16,121
Belgium	...	...	271	—	9,395	—	9,666
Other Foreign Countries	...	...	29,048	1,426	21,857	75	52,406
<i>Total Foreign Countries</i>	...	...	98,006	5,027	141,673	78	244,784
GRAND TOTAL	...	...	210,506	38,920	541,611	26,005	817,042

In addition there were imports of bullion, specie, and currency notes to the value of £3,853 from the United Kingdom and £4,974 from foreign countries.

(iii) Principal Imports, 1933.

Article.	Total Quantity.	Total Value. £	Principal countries of origin with amounts in £'000.
<i>Class I—</i>			
<i>Tobacco—</i>			
Unmanufactured	1,103,163 lb.	46,209	United States of America (45).
Cigarettes	41,317 „	12,525	United Kingdom (12).
Other kinds	1,589 „	602	
	1,146,069 „	59,336	
Wheaten Flour	30,584 cwt.	19,995	Canada (17), United Kingdom (2).
Salt, coarse	4,272 tons	19,801	United Kingdom (14), Germany (6).
Beer, ale, etc.	91,737 gal.	18,688	United Kingdom (8), Irish Free State (5), Germany (4).
<i>Vegetables—</i>			
Onions	10,589 cwt.	4,554	Egypt (2), Holland (1).
Dried, canned and preserved	2,746 „	4,232	Italy (3).
Other kinds	4,030 „	1,998	
	17,365 „	10,784	
<i>Spirits—</i>			
Whisky	4,049 gal.	4,783	United Kingdom (4).
Gin	2,843 „	1,460	
Brandy	813 „	1,044	France (1).
Other kinds	1,817 „	1,411	
	9,522 „	8,698	
Milk	2,648 cwt.	8,481	United Kingdom (4), United States of America (1).
Wines	32,048 gal.	8,465	France (2), Spain (1), Holland (1), Germany (1).
Sugar	593 tons	8,305	United Kingdom (4), Czecho-Slovakia (2), Germany (1).
<i>Class II—</i>			
Coal	20,168 tons	27,126	United Kingdom (all).
<i>Class III—</i>			
<i>Cotton Manufactures—</i>			
<i>Piece Goods—</i>			
Coloured	1,907,592 sq. yds.	47,083	United Kingdom (27), India (13), Japan (5).
Bleached	1,856,080 „	29,740	United Kingdom (26), Japan (3).
Printed	1,122,680 „	22,431	United Kingdom (20).
Dyed	918,022 „	22,078	United Kingdom (21).
Grey	335,246 „	3,619	United Kingdom (3).
Other kinds	—	41,464	United Kingdom (37).
		166,415	
Iron and Steel Manufactures	...	49,991	United Kingdom (38), Germany (3).

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>				<i>Total Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of origin with amounts in £'000.</i>
<i>Class III—continued.</i>						
<i>Oils—</i>						
Motor Spirit	...	...	...	279,961 gal.	15,144	United States of America (13), Portugal (2).
Illuminating	...	...	...	260,802 „	14,900	United States of America (14).
Other kinds	...	...	...	162,984 „	7,424	United States of America (5), United Kingdom (1).
				703,747 „	37,468	
Bags and Sacks	...	...	...	106,942 doz.	32,022	India (31).
Machinery (all kinds)	...	...	...	—	24,619	United Kingdom (20).
Apparel	...	...	...	—	21,171	Japan (13), United Kingdom (7).
<i>Artificial Silk Manufactures—</i>						
Piece Goods	...	...	...	563,220 sq. yds.	14,678	Japan (8), United Kingdom (5), France (1).
Other kinds	...	...	...	—	3,221	United Kingdom (2).
					17,899	
Electrical and Telegraphic Apparatus	...	...	...	—	15,997	United Kingdom (15).
Motor-cars and parts, etc.	...	...	...	—	13,225	United Kingdom (11), Canada (1).
Medicines and drugs	...	...	...	—	12,235	United Kingdom (9), United States of America (1).
Boots and Shoes	...	...	...	—	11,907	Japan (6), United Kingdom (5).
Hats, Caps, etc.	...	...	...	—	11,102	Germany (4), United Kingdom (3), Belgium (1).
Cement	...	...	...	3,215 tons	8,734	United Kingdom (7), Belgium (1).

V.—Natural Resources.

A.

1. AGRICULTURAL.

All agricultural production is in the hands of native small-holders. A great part of their production is, naturally, foodstuffs for their own consumption, but some crops are grown primarily for export. The principal agricultural exports, with the average exports over the 10 years ending 1933, are:—

	<i>Tons.</i>	<i>Value.</i> £
Palm kernels	63,444	874,467
„ oil	2,678	65,877
Kola	2,664	177,983
Ginger	1,793	54,164
Piassava	2,403	27,661

(i) *Main Export Crops.*

Oil-palm products.—Oil-palms have not been cultivated, but large areas are covered by wild growths from which the nuts are collected. Recently a few small artificial plantations have been made with new and superior varieties of palms introduced by the Agricultural Department. There has been a steady increase in exports over the last 40 years; in 1932 the record of 77,000 tons of kernels was reached and there is no reason to suppose that the maximum possible output has been attained. Owing, however, to the policy of certain Governments in excluding vegetable oils from their markets, the remaining free markets have suffered from a surfeit of vegetable oils and the prices have been depressed accordingly. Sierra Leone has suffered with the rest of the oil-producing countries and the export of palm kernels fell from 77,000 tons in 1932 to 64,084 tons in 1933; and the value from £687,477 to £472,824. The exports of palm kernels and palm oil for the last five years have been:—

<i>Year.</i>	<i>Palm Kernels.</i>		<i>Palm Oil.</i>	
	<i>Tons.</i>	<i>Value.</i> £	<i>Tons.</i>	<i>Value.</i> £
1929	60,205	876,308	2,845	75,153
1930	56,641	664,591	3,652	79,310
1931	54,462	449,742	1,359	19,830
1932	77,162	687,477	2,208	26,914
1933	64,084	472,824	1,619	16,637

Kola.—Kola is collected from both wild and semi-cultivated trees, i.e., trees planted in or around a village and left to look after themselves. There has been a steadily increasing industry during the last 40 years but the industry depends on the demands for kola in West African markets. Certain markets, such as Dakar, are being closed against Sierra Leone kola by high preferential tariffs, while the high import duties into Nigeria and into the Gambia are having a limiting effect on exports to those countries. Kola is therefore declining in price and much less is being exported. The exports for the last five years have been:—

<i>Year.</i>	<i>Tons.</i>	£
1929	3,127	266,422
1930	2,271	186,197
1931	1,584	47,847
1932	2,085	41,373
1933	1,812	43,656

Ginger.—This is another industry which has steadily increased during the last 40 years. The ginger is of a relatively poor quality, being roughly grown and prepared. The market is fluctuating and the prices vary enormously. The quantities exported generally vary according to the price offered, being high when the price is high and low when the price is low, a proportion of the crop in the latter case being left in the ground for another year in the hope of a rise in price. During the last five years the price has declined considerably as will be shown by comparing the figures for 1929 and 1933 given below.

Year.		Tons.	£
1929	... ..	1,549	59,308
1930	... ..	1,972	57,228
1931	... ..	1,927	32,518
1932	... ..	1,382	22,877
1933	... ..	1,545	16,543

Piassava.—The fibre is collected from wild palms, of which there is a large supply in certain parts of the country. Exports of piassava are increasing and reached a record figure of 3,499 tons in 1933. During the last few years propaganda and produce inspection have resulted in a noticeable improvement in quality of exports, and the price of this commodity is the only one which has maintained itself to any extent during the last three years of falling prices. There are prospects of further increases in exports. Exports of piassava fibre stalk during the last five years have been as follows:—

Year.		Tons.	£
1929	... ..	1,232	17,177
1930	... ..	2,417	36,582
1931	... ..	3,150	31,846
1932	... ..	2,877	23,290
1933	... ..	3,499	30,108

(ii) Minor Export Crops.

Chillies.—Exports have fluctuated from 10 to 100 tons, averaging over 70 tons for the last ten years. The quantity is largely determined by the price offered and could be considerably increased if demand increased. Exports during the last five years have been as follows:—

Year.		Tons.	£
1929	... ..	62	5,131
1930	... ..	111	4,421
1931	... ..	11	522
1932	... ..	67	2,162
1933	... ..	69	1,486

Cocoa.—Exports have increased during the last decade, prior to which they were negligible, but the country as a whole is not very suitable for cocoa and it is not expected that it will ever become a crop of major importance. Exports during the last five years have been as follows:—

Year.		Tons.	£
1929	... ..	96	3,398
1930	... ..	80	2,548
1931	... ..	61	1,034
1932	... ..	81	1,295
1933	... ..	67	990

Coffee.—Exports, which were never large, have been almost negligible in recent years (averaging 4 tons per annum), but efforts have recently been made to stimulate the production and there are signs that exports will shortly increase.

Benniseed (Sesame seed).—Exports are decreasing, presumably owing to competition by other countries better suited climatically to produce it. The average export in the ten years ending 1931 was 66 tons (value £1,081). The figures for the last five years are:—

Year.		Tons.	£
1929	... ..	179	2,997
1930	... ..	41	538
1931	... ..	83	752
1932	... ..	120	1,122
1933	... ..	14	125

Other crops.—There is a very small quantity of *rubber*, now practically neglected. Tropical fruits are, of course, grown and trial shipments of *oranges* and *pineapples* suggest that there may be possibilities of an export trade in those products. The Government has established a fruit farm at Newton where trials with grapefruit, oranges, lemons, and bananas are being made. Experiments have been made with *sisal* at the Government Experimental Station, and reports on its quality were favourable. *Cotton* and *tobacco* are at present grown for local consumption only. Attempts to foster cotton growing on a large scale have failed, but parts of the Northern Province are suitable for tobacco and its cultivation has increased in recent years. There is a small export trade in *Calabar beans*.

(iii) Food Crops.

Rice.—Is the most important crop and the staple food of the people. A very approximate estimate of the total production in 1931 was 200,000 tons of clean rice. Enough is now produced to satisfy local needs throughout the year and there is sometimes a small surplus for export, which may increase as conditions for the production of rice are decidedly favourable. Considerable efforts have been made during the past few years to extend rice cultivation and to effect improvements in the methods employed. A small rice farm for the selection of improved high-yielding types in the Scarcies area has been leased and opened in January, 1934.

The other principal food crops are cassava, yams, sweet potatoes, maize, millets, groundnuts, and coconuts. No estimates of the acreage and output of these are available.

2. FOREST PRODUCTS.

The forest area of the country consists of about 800 square miles of reserved forest, and an unknown but steadily diminishing area of unreserved forest. The great majority of the reserved forest is virgin forest of the rain forest type.

A systematic survey of the forests was begun in 1932 with a view to discovering the nature of the forest crop and the possible yield. The contents of the forest consist almost entirely of hardwoods, of which only a few are as yet recognized to be of value even in the local market. The forests are to all intents and purposes not exploited commercially but contractors are being encouraged to purchase logs for the supply of the local market with pit-sawn boards and scantlings.

A great deal of the timber requirements of the country are at present met by imports. The substitution of local for imported timbers in the local market appears to be an indispensable preliminary to any overseas timber trade.

There is a very small export trade in gum copal, but there is no immediate prospect of any substantial increase in this trade.

3. ANIMAL HUSBANDRY.

There are no exact figures of the live-stock in Sierra Leone. Cattle farming is carried out on a small scale in the Northern Province. Some 4,000 head per annum are slaughtered in Freetown for consumption, as well as those slaughtered in the interior; but a large proportion are imported from French Guinea. Sheep and goats are bred on a moderate scale throughout the country and pigs to a small extent. No work in this field is at present undertaken by the Government. Exports of animal produce consist exclusively of hides and skins (untanned), coming from the animals slaughtered for food as stated above. The value of these exports was £1,336 in 1933.

4. MINERALS.

Given in their probable order of relative importance the following minerals occurring in deposits of economic value have been located in Sierra Leone: hematite iron-ore, diamond, gold, chromite, and platinum. In addition deposits of ilmenite, rutile, corundum, bauxite, and of soapstone are known to exist in Sierra Leone, and these may at some time be capable of exploitation.

Hematite Iron-Ore.—A deposit of good grade hematite containing some 12,000,000 tons of ore averaging approximately 56 per cent. Fe. occurs at Lunsar, Marampa Chiefdom, Port Lokko District, Northern Province. This deposit is being exploited by the Sierra Leone Development Company, Limited. A railway has been constructed from the deposit to the port of Pepel, on the Sierra Leone River, a few miles to the north-east of Freetown. Loading equipment of up-to-date design has been installed at Pepel, and all construction work at Pepel, on the railway, and on the mine at Lunsar was completed by June, 1933.

Negotiations are proceeding with the Sierra Leone Development Company for the grant of exclusive prospecting rights over very extensive deposits of hematite iron-ore occurring near the Tonkolili River in the southern part of Koinadugu District, Northern Province. The deposits are situated some 80 miles to the north-east of the Marampa deposit and the reserves of good grade hematite ore probably are in excess of 200,000,000 tons.

Diamond.—Alluvial diamonds were discovered by the Geological Survey in the Kono and Kenema Districts of the Southern Province in 1930 and 1931, respectively. A special Exclusive Prospecting Licence for diamond only over an area of 4,170 square miles covering these discoveries was granted to the Consolidated African Selection Trust, Limited, for a period of three years as from the 15th May, 1931.

Prospecting has shown that valuable deposits of diamond of gem quality and of large average size occur in the headwaters of the Shongbo and Bandafayi Rivers situated a few miles to the east of Sefadu, Kono District. A mining lease was applied for over a portion of the Shongbo, and production commenced on a small scale in January, 1933. From that time it has increased rapidly and now diamonds are an important factor in the country.

In October, 1934, an agreement was signed between the Sierra Leone Government and the Consolidated African Selection Trust Limited whereby the latter's diamond areas were taken over by a new Company—The Sierra Leone Selection Trust Limited. This company holds a monopoly for winning diamonds in Sierra Leone and in return the Government participates in the profits.

Production since January, 1933, is as follows:—

Year.	Diamonds (Carats).	Approximate value.
		£
1933	32,017	64,034
1934 to 3rd Quarter	47,663	95,326
Total	79,680	£159,360

Gold.—The gold deposits of Sierra Leone are all alluvial in character and occur in streams and rivers draining the belt of schists which form the Kangari-Sula range of hills. Production since mining was commenced in 1930 has been as follows:—

Year.	Oz. (Crude Gold.)	Approx. Value. £
1930	957	3,058
1931	6,650	27,722
1932	12,125	65,855
1933	15,604	91,050
1934 to 3rd Quarter	16,897	108,151
Total	52,233	£293,413

Chromite.—Deposits of chromite have been discovered by the Geological Survey at several localities along the Kambui Hill schist belt, but the only deposit which appears to be large enough and of sufficiently high grade to permit of exploitation occurs near Lago, some 4 miles to the north-west of Hangha on the Sierra Leone Government Railway.

The chromite occurs as a series of lenses, each from 4 feet to 20 feet wide and about 100 feet long, associated with outcrops of serpentines and talcose rocks. Prospecting by shafting and adits to a depth of approximately 75 feet, has proved 80,000 tons of ore averaging between 43 per cent. and 48 per cent. Cr_2O_3 . The deposit requires to be examined in depth by drilling, when it is probable that many times this quantity of ore will be proved. On account of the financial depression prospecting of the deposit ceased in 1932, and has not been resumed.

Platinum.—Alluvial deposits of platinum occur in the neighbourhood of York in the Colony. The deposits occur in small and very rocky streams. The marked fall in the price of the metal since the discovery of the deposits has retarded their development.

Production since mining was commenced in 1929 has been as follows:—

Year.	Oz. (Crude Platinum).	Approx. Value. £
1929	26	252
1930	542	3,055
1931	594	3,093
1932	531	4,147
1933	431	2,493
1934 to 3rd Quarter	356	2,136
Total	2,480	£15,176

Ilmenite.—Occurs in the Colony as bands, several feet thick, in the norite mass near Hastings, and in alluvial deposits in the Whale and Toke Rivers near York. A renewed interest has recently been shown in the latter, but it is as yet too early to expect any developments.

Rutile.—Is a common constituent of the gravels of the Little Skarcies and Mabile Rivers near their confluence, and also occurs in good concentration in other parts of the Protectorate.

Corundum.—Is widely distributed in Sierra Leone. It is found in the gravels of streams draining the area of contact between the granites and the ultra basic rocks of the Kambui schist series.

Bauxite.—Of medium quality has been noted in several places in the Colony and in the Protectorate. Nothing has been done to determine whether there are deposits of economic size.

Soapstone.—Occurrences of white massive talc have been noted in one or two localities in the Protectorate. These are associated with rocks of the Kambui schist series. The most promising of these occurrences was that seen near the town of Grima in the north of Kenema District.

5. FISHERIES.

There is no export trade in fish, and such trade as exists is in the hands of native fishermen who supply the small local markets at coastal towns. Attempts have been made to commercialize fishing, but these have not up to the present proved successful owing to the unsuitable type of boat used. Fishing is carried on both in the sea and in the rivers.

B.

FOOD SUPPLIES.

Sierra Leone is practically self-supporting except for the requirements of Europeans, in respect of which it could not be made self-supporting.

The principal foodstuff requirements of Europeans and natives which cannot be obtained in the country but have to be imported are flour, meat, milk, butter, sugar, tea, potatoes, and manufactured foodstuffs, such as biscuits, jams, and preserved goods.

VI.—Industry.

There are no large organized industries but there are several "cottage" industries such as the weaving of country cloths, manufacture of mats, and working of leather into ornamental coverings for tins and bottles. These productions are mainly for local sale. Several trading firms in Freetown make soda-water for local consumption.

There is a boat-building trade in Freetown, small boats capable of accommodating 20 or 30 persons being built to ply along the coast and on the creeks and rivers.

VII.—Other Economic Activities.

There is little or no entrepôt trade in this Colony. From time to time a small amount of transit goods are transhipped at this port for other ports in West Africa from vessels of Messrs. Elder Dempster Lines, Limited, employed on the Canada-Capé run.

Tourist traffic is negligible. One or two holiday cruisers have called at Freetown during the last few years and generally stay from 6 to 24 hours.

VIII.—Communications.

ROADS.

Colony.—There are 50 miles of roads and streets in Freetown, of which about 30 miles are motorable. In the rest of the Colony there are some 39 miles of motorable roads, including a motor road, 18 miles long, from Freetown to Waterloo. Non-motorable roads connect the smaller towns and villages.

Protectorate.—There are approximately 814 miles of road open to motor traffic throughout the year and about 140 miles of second-class roads open to motor traffic at most periods of the year.

Fifteen ferries are maintained in the Protectorate for transporting motor vehicles over the large rivers, in cases where the width of the river has rendered the construction of a bridge financially impracticable.

There is a Government motor bus service in Freetown. The fleet in 1933 consisted of six passenger vehicles and two goods lorries. The total number of passengers carried was 243,861, and the gross receipts amounted to £2,593.

Motor transport in the Protectorate is undertaken by private persons and is mostly in the hands of Syrians.

RAILWAY SYSTEM.

The Sierra Leone Government Railway consists of 311 route miles of 2 feet 6 inches gauge, or, including sidings, 327 miles.

The main line, which was the first railway to be constructed in British West Africa, runs in an easterly direction from the port of Freetown to Pendembu, a distance of 227½ miles, the terminus being within 20 miles of the Liberian frontier and approximately double that distance from the frontier of French Guinea.

From Bauya Junction, 64½ miles from Freetown, a branch line runs in a northerly direction to Makeni, a distance of 83 miles.

Passenger trains run on the main and branch lines in the up and down directions on alternate days. In the local (or suburban) area between Freetown and Waterloo, several trains run daily in each direction.

A daily goods train service is run.

The principal operating results for the year 1933 are as follows:—

Number of passenger journeys	373,161
Tonnage of goods (paying)... ..	54,866
Train mileage (excluding service)	336,385
Total engine mileage	435,654
£	
Revenue	145,594
Working expenditure	137,323
Loan charges—(not included in working expenditure)	68,399
Gross expenditure	205,931

Private Mineral Railway.—A private railway of approximately 60 route miles of 3 feet 6 inches gauge has been constructed by the Sierra Leone Development Company between Marampa in the district of Port Loko, and Gapul Point in the Port Loko Creek for the transport of mineral ore from the Company's concession to the coast. Public traffic is not carried.

RIVERS.

The country is well watered, and the lower reaches of all the rivers are navigable for boats and canoes, and a considerable traffic is carried on by these means. The most commonly used craft are open sailing boats with a carrying capacity of about 4 tons. During recent years motor launches have come into use and this form of water transport appears to be growing increasingly popular with the natives.

OCEAN COMMUNICATION.

The following shipping lines call regularly at Freetown on their way to or from other West African ports:—

<i>Line.</i>	<i>From</i>	<i>Frequency of calls.</i>
American West African Line	New York	Every 20 days with general cargo.
Clan Line Steamers, Limited	Australia, Mauritius etc.	About 3 monthly for bunkers.
Compania Amaya	Continental ports	One in 2 months (cargo).
Co. Trasmediterranea	Barcelona	One monthly (passenger).
Elder Dempster Lines	United Kingdom ports	Passengers fortnightly; cargo frequently.
Elder Dempster Lines	Continental ports	Fortnightly.
Elder Dempster Lines	Canada	Monthly.
Fabre-Fraissinet	Marseilles	Monthly.
Holland West African	Hamburg, Amsterdam, Bordeaux coast ports up to Spanish Guinea.	Passengers monthly; cargo monthly.
L'Equatorial	Continental ports	Cargo monthly.
Navigazione Triestina Libera	Genoa, coast ports	Cargo monthly.
Societe Navale de l'Ouest Chargeurs Reunis.	Continental ports	Cargo monthly.
United Africa Company, Limited	Liverpool, coast ports	Cargo monthly.
Woermann	Hamburg, Southampton and Continental ports.	Passengers monthly.
Woermann	Hamburg, Amsterdam	Cargo monthly.

AIR COMMUNICATIONS.

There are no regular air services, but two landing grounds exist at Wellington, 7 miles from Freetown, and at Daru in the Protectorate. Neither ground is fit for use without considerable notice. Seaplanes can alight at Cline Bay close to Freetown.

PORT FACILITIES.

1. *Freetown* is one of the finest natural harbours on the West Coast of Africa. The least depth on the bar at the entrance is 7 fathoms. In the anchorage, off the city of Freetown, the depth varies from 8 to 19 fathoms. Cargo is loaded and discharged by means of lighters. At Government Wharf there are three jetties at which lighters can be worked at any state of tide.

During the year 1933, 556 merchant vessels of an aggregate tonnage of 1,664,207 tons entered the port of Freetown.

2. The *Port of Sherbro* consists of the sound or strait which separates the Island of Sherbro from the mainland. It is obstructed by numerous shoals and sand banks but there are various anchorages capable of use by vessels of from 19 to 26 feet draught. Cargo is loaded and discharged from jetties by lighters.

In the year 1933, 79 ocean-going vessels called at the Port of Sherbro.

3. Vessels call about once a month at Sulima and Mano Salija, where boats lie in the open sea and receive and discharge goods by means of surf boats.

IX.—Tariff.

Import duties are levied on all imports, with the exception of an extensive list of goods exempted for special reasons. Specific rates or, in a few cases, special *ad valorem* rates are charged on a number of goods; all others pay duty at the rate of 10 per cent. preferential and 20 per cent. general in the case of foodstuffs, or 20 per cent. preferential and 30 per cent. general in other cases.

Imperial preference is provided in every case by lower duties on goods of Empire origin or, in some cases, free entry.

X.—Trade Representative.

The Comptroller of Customs is the trade representative of Sierra Leone in the Colony. There is no trade representative overseas.

APPENDIX.

Description of Loan.	Amount Outstanding at 31st December 1933.	Annual amount required for interest.	Annual amount required for Sinking Fund.	Total value of Sinking Fund at 31st December 1933.	Remarks.
Sierra Leone Government 3½ per cent. Inscribed Stock (1929-1954).	£ 729,848	£ 25,545	£ 7,299	£ 424,230	Interest payable half-yearly on 1st June and 1st December in each year by the Crown Agents in London. The principal will be repaid at par on 1st June, 1954, but Government have the option of redemption on or after 1st June, 1929.
Sierra Leone Government 4 per cent. Inscribed Stock (1938-1963).	1,000,000	40,000	10,000	317,617	Interest payable half-yearly on 15th June and 15th December in each year by the Crown Agents in London. The principal will be repaid at par on 15th June, 1963, but Government have the option of redemption on or after 15th June, 1938.
Sierra Leone Government 4½ per cent. Inscribed Stock (1955) (Inter-Colonial).	57,825	2,603	1,250	7,872	Interest payable half-yearly on 15th March and 15th September in each year by the Crown Agents in London. The principal will be repaid at par on 15th March, 1955.
Sierra Leone Government 4½ per cent. Inscribed Stock (1955).	202,500	9,113	5,826	—	Interest payable half-yearly on 1st June and 1st December in each year by the Crown Agents in London. The principal will be repaid at par on 1st December, 1955. Sinking Fund contributions are not payable until 1st June, 1934.
Sierra Leone Government 4½ per cent. Inscribed Stock (1955).	151,100	6,800	4,500	—	Interest payable half-yearly on 1st June and 1st December in each year by the Crown Agents in London. The principal will be repaid at par on 1st December, 1955. Sinking Fund contributions are not payable until 1st June, 1934.
Total ...	£2,141,273	£84,061	£28,875	£749,719	The Loans are secured on the general revenue and assets of the Government of Sierra Leone and are Trustee Securities.

SAINT HELENA.

I.—Situation, etc.

The Colony of St. Helena consists of the Island of St. Helena (47 square miles in area) and its dependency the Island of Ascension (34 square miles in area).

St. Helena lies south of the Equator in the South Atlantic about 4,000 miles from the United Kingdom (14 days by steamer) and 1,700 miles from Cape Town (5 days by steamer), and Ascension lies about 700 miles north-west of St. Helena.

The climate is equable and shows no extreme of heat or cold. It is very healthy. In 1933 the lowest monthly minimum temperature was 53·6° F. in September and the highest 62·8° F. in March, while the lowest monthly maximum was 59·3° F. in September and the highest 70·2° F. in March.

The rainfall is moderate but varies considerably in different parts of the Island. In 1933 the total rainfall at Hutt's Gate was 21·76 inches, at Plantation House 22·48 inches, and at Jamestown 7·64 inches only.

Of the total area of St. Helena, consisting of approximately 30,000 acres, about 8,600 acres comprise agricultural and forest land. The remainder consists of barren rocky wastes or clayey slopes totally unfit for agricultural development.

Of the land which is of economic value, namely, 8,600 acres, 4,200 acres are owned by Government, 2,800 by the three principal landowners, and the remainder by small landowners. Most of the Government land is leased.

It was estimated at the end of 1933 that there were 191 separate holdings of land, of which 150 were under 10 acres and only two of over 1,000 acres.

II.—Population, etc.

The population as ascertained by the Census taken in the year 1931 is classified as follows:—

	<i>Males.</i>	<i>Females.</i>	<i>Total.</i>
Islanders	1,825	2,026	3,851
Other British Residents ...	77	65	142
Other Nationals	2	—	2
	<u>1,904</u>	<u>2,091</u>	<u>3,995</u>

The population of Ascension as ascertained by the Census taken in the year 1931 is classified as under:—

St. Helenians	152
Other British Residents	36
	<u>188</u>

The estimated population of St. Helena at the 31st December, 1933, was 4,170, but owing to the retrenchment of personnel of the Imperial and International Communications, Limited, the population of Ascension at the end of 1933 had fallen to 170.

Apart from some 70 normally engaged in fishing, 250 in the flax industry, and 210 in various occupations, the remainder of the employable population is dependent on agricultural and casual employment. There is at present, however, a large number of unemployed.

Ascension is an important cable station. Practically all the inhabitants are English and St. Helenian employees of Imperial and International Communications, Limited.

Immigration and emigration into and from St. Helena are negligible.

III.—Finance.

A.—CURRENCY AND BANKING.

1. United Kingdom and South African currency are legal tender and Bank of England notes circulate in the Colony.

2. The Government Savings Bank is the only banking institution. The total number of depositors on 31st December, 1933, was 207, and the amount standing to the credit of depositors was £20,958.

3. The Government gives facilities for transfer of funds overseas by selling bills of exchange drawn on the Crown Agents.

B.—PUBLIC FINANCE.

1. There is no public debt.
 2.—(a) The actual revenue of the Colony for the year 1933 was £18,548.

Principal Heads of Revenue.

<i>Head.</i>	<i>Actual Revenue 1933. £</i>	<i>Proportion of whole per cent.</i>
Customs	4,754	35
Ascension revenue	2,926	22
Lands	1,119	8
Fines, fees, etc.	1,354	10
Miscellaneous and other	3,395	25
	13,548	100
Grant-in-aid	5,000	
Colonial Development Fund	Nil	
	£18,548	

- 2.—(b) *Analysis of Import Duties for 1933.*

Amount of duty collected on articles imported from:—

	<i>United Kingdom. £</i>	<i>Rest of Empire. £</i>	<i>Foreign Countries. £</i>	<i>Total. £</i>
Class I	2,547	379	133	3,059
Class II	—	—	3	3
Class III	552	21	107	680
	3,099	400	243	3,742

3. The actual expenditure for 1933 was £18,617.

Principal Heads of Expenditure.

<i>Head.</i>	<i>Expenditure 1933. £</i>	<i>Proportion of whole per cent.</i>
Administration	8,185	44·0
Social Services	6,435	34·6
Economic Development	2,908	15·6
Non-effective (Pensions)	1,064	5·8
	18,592	100·0
Colonial Development Fund	25	
	£18,617	

5. *Grants-in-aid.*

The following grants-in-aid have been received from the United Kingdom Exchequer and the Colonial Development Fund:—

	1929. £	1930. £	1931. £	1932. £	1933. £
1. United Kingdom Exchequer	4,000	6,000	7,000	13,500*	7,500
2. Colonial Development Fund—					
(a) Reconstruction of Roads	—	1,857	3,189	1,300	—
(b) Forestry Development	—	—	50	—	—
(c) Improvement of Telephone System†	—	—	475	—	25

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	<i>United Kingdom. £</i>	<i>South Africa. £</i>	<i>Foreign Countries.</i>	<i>Total. £</i>
1913	6,900	668	—	7,568
1930	18,699	1,146	—	19,845
1931	12,205	562	—	12,767
1932	5,774	1,106	—	6,880
1933	10,356	333	82	10,771

* £5,600 of this represents grant-in-aid of expenditure for the year ended 1931, but not issued till 1932.

† (c) Loan for the improvement of the local Telephone System, repayable by 5 per cent. annuities.

(ii) Domestic Exports by Classes, 1933.

Country of destination.	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	—	9,526	798	—	10,324
South Africa	—	—	333	—	333
Argentina	82	—	—	—	82
TOTAL	£82	£9,526	£1,131	—	£10,739

(iii) Principal Domestic Exports, 1933.

Article.	Quantity.	Total Value. £	Countries of destination with value in £.
<i>Class I—</i>			
Live Crayfish	5,500	82	Argentina.
<i>Class II—</i>			
Phormium tenax Fibre	668 tons	7,553	United Kingdom.
" Tow	285 "	1,873	United Kingdom.
Wool	69 cwt.	100	United Kingdom.
<i>Class III—</i>			
Rope and Twine	45 tons	968	United Kingdom (635), South Africa (333).

IMPORTS.

(i) Total Imports from:—

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
1913	37,487	4,721	1,186	43,394
1930	36,160	5,101	3,150	44,411
1931	35,920	5,218	2,745	43,883
1932	28,732	3,136	4,361	36,229
1933	22,273	5,095	3,751	31,119

(ii) Imports by Classes, 1933.

Country.	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	10,798	118	9,475	862	21,253
South Africa	2,587	211	183	29	3,010
British India	1,105	—	—	—	1,105
Rest of Empire	905	58	17	—	980
Total Empire	£15,395	£387	£9,675	£891	£26,348
France	43	108	952	3	1,106
Argentina	681	—	—	—	681
Holland	602	—	5	—	607
Other foreign countries	638	125	587	7	1,357
Total foreign countries	£1,964	£233	£1,544	£10	£3,751
GRAND TOTAL	£17,359	£620	£11,219	£901	£30,099

In addition bullion and specie to the value of £1,020 was imported from the United Kingdom. Imports have been classified by true country of origin since September, 1933.

(iii) Principal Imports, 1933.

Article.	Quantity.	Total Value. £	Principal countries of origin with value in £.
<i>Class I—</i>			
Flour	5,653 cwt.	3,027	United Kingdom (2,077), Australia (578), Argentina (372).
Provisions	—	2,240	United Kingdom (1,576), South Africa (242), New Zealand (100).
Sugar	3,216 cwt.	1,611	United Kingdom (all).
Butter and butter substitutes	416 "	1,188	United Kingdom (547), Australia (137), South Africa (67).
<i>Class III—</i>			
Cotton Manufactures—			
Piece Goods	39,280 yds.	1,058	United Kingdom (1,055).
Other kinds	—	1,033	United Kingdom (958).
		£2,091	

V.—Natural Resources, etc.

A.—AGRICULTURE

1. St. Helena possesses possibilities of agricultural development and is a country suitable for small holders.

The only agricultural product of any economic importance at the present time is *Phormium tenax* (New Zealand hemp). The total area under this crop is about 3,250 acres or over one-third of the total cultivable land of the Colony, namely 8,600 acres. The greater part of the flax is grown on the land of the three firms which own the mills at which it is manufactured into fibre and tow. There are eight private mills and the Government mill which has been leased to Messrs. Solomon and Company, one of the three firms referred to above. The flax produced by small holders is sold to the mill owners.

In 1933 about 80 acres were under oats, 70 under potatoes, and 60 under maize.

There is generally a plentiful supply of vegetables, but the cultivation of fruit trees has been neglected. In recent years vegetables and eggs have been regularly supplied to ships calling at the Island.

There are three acres under coffee. Samples of this coffee were sent to the Imperial Institute, which reported in May, 1931, that it might be expected to command a price about 5s. per cwt. below that fetched by the ordinary Kenya coffee on the London market. There are prospects of developing this industry by small holders.

Other possibilities of economic development which are at present under investigation are the cultivation of tobacco, of geranium for essential oil distillation and of spices such as chillies.

In Ascension there is little scope for agricultural production. The only suitable locality is on the upper slopes of Green Mountain and is utilized entirely for the needs of the Imperial and International Communications, Limited.

2. FORESTRY.

Some 550 acres are under forest in St. Helena, but timber is not available for export.

3. ANIMAL HUSBANDRY.

According to the latest estimate the live-stock in St. Helena is as follows:—

Horses ...	100	Mules ...	14	Sheep ...	2,150	Swine ...	250
Asses ...	1,275	Cattle ...	750	Goats ...	1,500		

Farming is carried on to a limited extent to supply local needs in meat, vegetables, and dairy produce and also to supply His Majesty's ships when visiting St. Helena; and bullocks and vegetables are supplied regularly to Ascension.

The live-stock in Ascension at the end of 1933 was 21 cattle, 400 sheep, and 44 pigs on the farm maintained by Imperial and International Communications Limited to supply local needs.

4. MINERALS.

St. Helena has been carefully surveyed, but the only mineral wealth discovered was a small deposit of manganese ore, which has never been worked.

Samples of coloured clays have been sent to the Imperial Institute, with a view to determining their commercial value and their suitability for the extraction of colours for distempers, etc. Of the ten samples submitted, five were found to be unsuitable, while the remaining five, though sufficiently coloured to be of possible use, were found not to be of any value for export purposes. They might, however, be of use for the manufacture locally of low-grade paint and distemper, bricks and tiles.

There are some phosphate and other mineral deposits on Ascension, the rights over which were formerly leased to the Ascension Island Phosphate and Guano Company and the St. Helena Colony Development Company; the concessions of these Companies were terminated in 1934.

5. FISHERIES AND MARINE PRODUCTS.

An attempt was made some years ago to start a fishing industry in the Colony, but without success. In 1933 twenty fishing boats, employing 70 hands, were at work and it is estimated that about £1,000 worth of fish were landed.

Turtles constitute the sole export from Ascension at present. In 1933 55 were captured, of which 48 were exported during that year. The number is much below those recorded some years ago.

B.—FOOD SUPPLY.

St. Helena is not self-supporting, owing to the development of the flax (*phormium tenax*) industry. It could to a larger extent than at present be made self-supporting by the development of small-holdings.

The principal food-stuffs imported are flour and rice, the latter being the staple article of diet of the peasantry. Various other articles of diet are imported, such as sugar, butter, margarine, lard, canned meat, and groceries of all descriptions.

VI.—Industry.

Apart from the manufacture of fibre and tow, a small part of the fibre is manufactured into rope and twine at a factory owned by Messrs. Deason Bros. and hand-made lace and aloe fibre mats and bags are produced by the women and girls of the Island.

VII.—Other Economic Activities.

A certain amount of money is spent in St. Helena by the passengers from ships calling at the port of Jamestown, but there is no tourist traffic in the proper sense of the word.

As already indicated the principal economic activity of Ascension is its function as a cable station, on the service of which its whole population depends.

VIII.—Communications.

There are 60 miles of good roads in St. Helena under the charge of the Public Works Department. Gradients are steep and continuous and from the port the road rises to an elevation of about 1,800 feet in 4 to 5 miles.

Motor conveyances and horse-drawn carriages are available for hire.

There are no river, air, or rail communications.

There is regular communication with England and South Africa once a month by the Union Castle Line's intermediate steamers. In addition there are occasional calls by other vessels, including His Majesty's ships.

The anchorage at Jamestown, St. Helena, is an open roadstead giving good anchorage about 4 cables from the shore in from 17 to 20 fathoms. Motor and other boats are available and there is good landing accommodation for passengers and cargo, together with facilities for the supply of pure fresh water for shipping.

At Ascension good anchorage in about 11 fathoms is found about 4 cables from the shore between Fort Thornton and Pyramid Rock. A jetty is available for passengers and cargo.

IX.—Tariff.

Duties are levied on imports as follows:—

(i) Articles named in a Schedule to the Customs Ordinance are subject to various specific duties or *ad valorem* duties (varying from 5 per cent. to 15 per cent.) with a surtax of 25 per cent. of the duty if not of Empire origin.

(ii) A few other articles are exempted wholly from duty.

(iii) All other goods are free if of Empire origin and otherwise subject to an *ad valorem* duty of 12½ per cent., or, in the case of rice, flour, and wheat, to a specific duty of 2s. 7½d. per 100 lb.

X.—Trade Representatives.

There are no trade representatives locally.

EASTERN DEPENDENCIES.

CEYLON.

I.—Situation, etc.

Ceylon is an island in the Indian Ocean lying off the southern extremity of India between latitude 5° 55' and 9° 50' North and longitude 79° 42' and 81° 53' East. Its area is 25,332 square miles, exclusive of the Jaffna lagoon, the area of which is 149 square miles.

The northern and north-central parts of the Island form one great plain from sea to sea. The maritime districts consist of similar level or undulating stretches, but the centre of the southern half of the Island is filled by a circular mountainous area almost equidistant from the two seas, intersected by deep valleys and culminating in a mountain 8,292 feet above sea level. Most of the agricultural production is concentrated in the south-west quarter of the island, which receives the rain of the south-west monsoon and is called the "wet zone", with coconuts and rubber in the coastal plains and foot-hills, and tea in the uplands. The bulk of the population of the Island is concentrated in this zone. In the "dry zone" the conditions of life are much more severe. The rainfall is scanty and uncertain and malaria in certain months almost universal. This area has at present little attraction for the agriculturist in search of land for development and is largely undeveloped.

On the whole the climate of Ceylon is good for the tropics and there is a valuable variation of temperature between the lowlands and uplands; at individual stations however there is little seasonal variation.

The highest temperature ever recorded in Ceylon was 103.7° Fahrenheit at Trincomalee in May 1890 and the lowest 27.1° at Nuwara Eliya in February 1914. The humidity is generally speaking high.

At Colombo the "hot weather" may be said to extend from March to May and the "cold weather" from December to February. July and August are often pleasant particularly on the west side of the island. In general the monsoon periods are comparatively cool and the intervals between them hot.

The mean monthly temperature ranges between 77.8° (December-January) and 85° (June) at Trincomalee, 78.8° (December) and 81.8° (April-May) at Colombo, and 56.8° (January-February) and 61.4° (May) at Nuwara Eliya.

The annual average rainfall varies from about 35 inches in the north-west and south-east to over 200 inches in some parts of the interior. Representative average figures over a number of years are 39 inches (Hambantota), 50 (Jaffna), 91 (Colombo) 93 (Nuwara Eliya), and 151 (Ratnapura). In the drier districts distribution is somewhat uneven. At Jaffna, for instance, there are normally only about 32 rainy days in the months January to September (inclusive) and 44 in the remaining three months of the year. In other parts, however, distribution is much more even; at Galle for instance the average number of rainy days per month varies from 7 to 22, at Nuwara Eliya from 6 to 24, and at Ratnapura from 9 to 25.

Ceylon may be roughly divided into the wet zone, the south-western portion and rather less than one-quarter of the Island, and the dry zone. Generally speaking, the wet zone only is at present suitable for economic development. There is comparatively little Crown land suitable for economic development available in the wet zone and what remains is remote from means of communication. The present policy of Government is to reserve this land for peasants or Ceylonese of moderate means. Practically none of it is available for development by outside capital. There is abundant undeveloped Crown land in the dry zone and a considerable extent of this will probably be available for development by outside capital as soon as the advance of science has indicated the methods by which it can be profitably opened up. Steps are being taken to ascertain how the dry zone can be developed under modern conditions.

II.—Population, etc.

At the Census of February, 1931, the population was 5,312,548 including 1,387 military and 4,290 on board ships in harbour. The estimated population on 31st December, 1933, was 5,463,200.

Details by race were not collected at this Census except in the Colombo Municipality and on the estates. The following table gives a rough estimate of the population by race on the Census date of 1931 based on the figures at the previous Census:—

Population of Colombo Town, Estates, and rest of the Island by Race (exclusive of the Military and the Shipping).

Race.	Colombo Town.	Estates.	Estimate for Other Areas.	Estimated Totals.
Europeans	3,340	2,814	2,999	9,153
Burghers and Eurasians	15,887	2,031	14,397	32,315
Sinhalese	127,927	75,786	3,269,317	3,473,030
Tamils	65,704	698,081	653,692	1,417,477
Moors	44,240	7,496	274,177	325,913
Malays	7,022	1,988	6,967	15,977
Others	20,035	1,738	10,791	32,564
Totals	284,155	790,376*	4,232,340	5,306,871*

* Includes 442 persons of unspecified race.

The Veddas are the aboriginal inhabitants of the country and the Sinhalese the descendants of the Aryan invaders of the centuries immediately preceding the Christian era. The Burghers and Eurasians are domiciled communities, descendants of European immigrants, mainly of Dutch and Portuguese origin, during the last three centuries. The Ceylon Tamils, originally immigrants from India, have been domiciled in Ceylon for many centuries. The Indian Tamils on the estates and elsewhere are more recent immigrants. The Moors are Muslims, some families of whom have been domiciled in the country for a number of generations.

Apart from fluctuations caused by immigration and emigration the general tendency is towards a steady increase in the population. In 1933 births numbered 209,032 and deaths 114,690, an increase on the year of 94,342 or roughly 1·7 per cent. of the total population.

There is very considerable movement of immigrants and emigrants every year, the greater part of it being accounted for by South Indians who come to Ceylon seeking work, chiefly in the tea and rubber industries, and for the most part return to India after earning a sufficient amount. Many of them, however, remain in the country permanently. During the years 1922 to 1928 (inclusive) immigrants exceeded emigrants by a substantial amount, but since then there has been an appreciable outward movement.

The figures for the last six years are as follows:—

					<i>Immigrants.</i>	<i>Emigrants.</i>	<i>Net gain (+) or loss (—) of population.</i>
1928	...	...	...	...	289,762	237,670	+52,092
1929	...	...	...	...	255,886	261,896	— 6,010
1930	...	...	...	...	223,152	263,000	—39,848
1931	...	...	...	...	183,122	214,703	—31,581
1932	...	...	...	...	158,222	187,059	—28,837
1933	...	...	...	...	136,057	194,227	—58,170

In 1933 89 per cent. of the immigrants came from India, and 93 per cent. of the emigrants were bound for India.

A large part of the Indian population is employed on the estates (mostly tea and rubber). In 1933 the estate labour was reported to be made up of 194,633 men, 187,026 women, and 227,876 children, a total of 609,535.

In 1921 about 63 per cent. of the population was engaged in agriculture, about 12 per cent. in industrial occupations, about 8 per cent. in various kinds of trades, and small proportions in other occupations.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the rupee divided into 100 cents. The exchange value of the rupee is the same as that of the Indian rupee, i.e., approximately 1s. 6d.

The coins in circulation are the Indian rupee, $\frac{1}{2}$ rupee, and $\frac{1}{4}$ rupee, and Ceylon coins of 50, 25, and 10 cents in silver, 5 cents in nickel and 1 and $\frac{1}{2}$ cent. in copper. There is a local issue of currency notes in eight denominations varying from 1 to 1,000 rupees.

The total amount of currency notes in circulation on 31st December, 1933, was Rs.42,060,944.

2. The following banks do business in Ceylon:—

The Imperial Bank of India.
 The National Bank of India, Limited.
 The Chartered Bank of India, Australia and China.
 The Hong Kong and Shanghai Banking Corporation.
 The Mercantile Bank of India, Limited.
 The Eastern Bank, Limited.
 The P. & O. Banking Corporation, Limited.
 Thos. Cook and Son (Bankers), Limited.
 The Bank of Chettinad, Limited.
 The Indian Bank, Limited.
 The Bank of Uva, Limited.
 The Hatton Bank, Limited.
 The Calicut Bank, Limited.

Except for the National and Mercantile Banks, each of which has three branches, all these banks are represented by a single branch.

The Bank of Uva and the Hatton Bank have their head offices in Ceylon.

3. There were on the 30th April, 1933, 779 Co-operative Societies in Ceylon with a total membership of 26,719. Paid-up share capital amounted to Rs.625,423, deposits to Rs.892,334 and reserve funds to Rs.170,665.

4. There are two Government Savings Banks in Ceylon, the Ceylon Savings Bank which has a single office in Colombo, and the Post Office Savings Bank which operates through 238 Post Offices and 158 Sub-Post Offices throughout the Island.

The principal particulars as at the 31st December, 1933, were as follows:—

					<i>Ceylon Savings Bank.</i>	<i>Post Office Savings Bank.</i>
No. of depositors	...	...	...	...	61,544	374,032
Total amount of credit to depositors	...	...	...	...	Rs.9,629,913	Rs.12,619,044

5. The Ceylon State Mortgage Bank was established on 25th April, 1932, for the purpose of granting long term loans for agricultural purposes on the primary mortgage of landed property in Ceylon. Its capital consisted on 31st March, 1934, of Rs.1,392,050 raised by the issue of debentures and Rs.15,812 from an overdraft. Loans on mortgages amounted to Rs.558,500.

The whole question of banking institutions in Ceylon is discussed at length in the Report of the Ceylon Banking Commission published by the Ceylon Government as Sessional Paper No. xxii of 1934.

B.—PUBLIC FINANCE.

1. *Public Debt.*

1. (a) Total Public Debt (on 30th September, 1933) ... { Sterling debt £15,733,468.
Rupce debt Rs.3,000,000.

Total (at 1s. 6d. per Re.) Rs.212,779,578 or £15,958,468.

(b) Amount required for	Interest. Rs.	Refund of principal or Sinking Fund. Rs.
In 1932-33	9,977,249	2,461,269
In 1933-34	9,690,289	2,554,769
(c) Total value of sinking funds (on 30th September, 1933) :—		
Sterling debt... ..	...	£6,780,088
Rupce debt	...	Rs.2,535,763
Total (at 1s. 6d. per Re.)	Rs.92,936,938 or £6,970,270	

Details regarding Loans comprising Ceylon Public Debt.

Description of Loan.	Amount in Rs. (at 1s. 6d. per Re.)	Amount required annually on debt as at 30.9.33 for		Value of Sinking Fund.
		Interest.	Sinking Fund.	
		Rs.	Rs.	Rs.
1. Debentures unredeemed	8,000. 0	—	—	—
2. 4 per cent. Inscribed Stock (Debentures converted) 1934. "	14,348,000. 0	573,921	143,481	18,397,492
3. 3 per cent. Inscribed Stock, 1940	38,000,000. 0	1,140,000	380,001	35,860,238
4. 3½ per cent. Inscribed Stock, 1959	20,000,000. 0	700,000	200,000	8,464,935
5. 4 per cent. Inscribed Stock, 1959	13,333,333.33	533,334	133,334	3,913,779
6. 6 per cent. Inscribed Stock, 1936-51	82,839,912.22	4,970,395	1,491,119	23,681,577
7. 5 per cent. Inscribed Stock, 1960-70	16,666,666.67	833,334	83,334	83,154
8. 4½ per cent. Inscribed Stock, 1965	24,583,666.66	1,106,265	*	—
	Rs.209,779,578.88	—	—	Rs.90,401,175
9. 4 per cent. Ceylon Inscribed Stock, 1942-44	3,000,000. 0	120,000	30,000	2,535,763
	Rs.212,779,578.88	Rs.9,977,249	Rs.2,461,269	Rs.92,936,938

Loans numbered 2 to 8 inclusive are trustee sterling securities.

2. (a) *Analysis of Revenue of Ceylon.*

(On basis of Estimates for the year ending 30th September, 1935.)

Self-balancing Departments.

	Revenue. Rs.	Expenditure. Rs.
Railways	21,600,000	20,558,165
Post Office and Telegraphs	6,350,000	7,089,462
Electrical Undertakings	924,088	547,340
Colombo Port Commission	5,379,000	2,617,701
Other Ports	155,000	43,402
	Rs.34,408,088	Rs.30,856,070

Net Surplus Rs.3,652,018.

General Revenue.

	Rs.	Percentage of Total.
1. Surplus on self-balancing Departments	3,552,018	4.1
2. Customs (including :—Import duties Rs.43,650,000; Export duties Rs.4,965,000)	48,650,000	55.4
3. Licences, Excise and Internal Revenue	14,620,000	16.6
4. Income-tax	8,750,000	10
5. Fees of Court, etc.	6,482,000	7.4
6. Miscellaneous ; interest, land revenue, etc.	5,700,077	6.5
	Rs.87,754,095	100
Equivalent to £6,581,557.		
Revenue of self-balancing Departments (excluding Railways) set off against Expenditure	10,197,905	
Total Revenue	Rs.97,952,000	

* Sinking Fund contribution of Rs.307,295/- per annum payable from 1st May, 1934.

(b) Analysis of revenue from import duties in 1933.

Amount of duty collected on articles imported from:

	United Kingdom. Rs.	Rest of Empire. Rs.	Foreign Countries. Rs.	Total. Rs.
Class I	2,724,009	10,691,442	9,946,678	23,362,129
	or £204,301	or £801,858	or £746,001	or £1,752,160
Class II	50,083	149,902	192,253	392,238
	or £3,756	or £11,243	or £14,419	or £29,418
Class III	3,230,991	915,310	10,880,677	15,026,978
	or £242,342	or £68,648	or £816,051	or £1,127,023
	Rs.6,005,083	Rs.11,756,654	Rs.21,019,608	Rs.38,781,345
	or £450,381	or £881,749	or £1,576,471	or £2,908,601

Note.—The above rupee figures have been converted into sterling at 1s. 6d. to the rupee.

3. Analysis of Expenditure of Ceylon.

(On basis of Estimates for the year ending 30th September, 1935, excluding expenditure from loan funds.)

	Rs.	Percentage of Total.
1. Loss on Self-balancing Departments	—	—
2. Debt Charges	12,011,337	13.4
3. Administration	25,497,522	28.2
4. Economic Development	11,057,418	12.4
5. Social Services	28,728,216	32.2
6. Defence	2,156,147	2.4
7. Non-effective, i.e., Pensions	10,267,800	11.4
Equivalent to £6,728,883.	Rs.89,718,440	100
Expenditure of self-balancing Departments set off against Revenue	10,197,905	—
Total ...	Rs.99,916,345	—

4. On 31st March, 1934, Ceylon possessed—

	Rs.
Fixed deposits in banks	4,929,347
Crown Agents Joint Colonial Fund	19,253,333
Investments	10,072,274

Surplus balances amounted to Rs.25,453,762

5. Ceylon has no grants-or loans-in-aid, and has not asked for any.

Ceylon has not yet received any grant from the Colonial Development Fund. The Tea Research Institute received a grant of £1,000 from the Empire Marketing Fund, all of which has now been expended.

IV.—Trade Statistics.

EXPORTS.

(1) Total Exports (including Bullion and Specie) to:—

	United Kingdom. Rs.	Rest of Empire. Rs.	Foreign Countries. Rs.	Grand Total Rs.
1913	105,612,743	30,221,302	99,029,509	234,863,554
1930	136,800,233	64,853,144	108,517,786	310,171,163*
1931	102,735,080	54,607,975	69,364,186	226,707,241*
1932	83,944,065	39,206,349	47,159,264	170,309,678*
Equivalent to	£6,297,379	£2,941,211	£3,537,829	£12,776,419*
1933	92,590,285	36,420,653	54,193,538	183,204,777†
Equivalent to	£6,944,271	£2,731,549	£4,064,538	£13,740,358†

* Excludes Parcel Post and Ships' Stores.

† Excludes Ships' Stores only.

Values of Parcel Post and Ships' Stores were as follows:—

	Parcel Post. Rs.	Ships' Stores. Rs.
1930	2,355,822	20,721,713
1931	1,295,407	19,622,958
1932	1,380,097	17,365,395
1933	—	17,043,809

(ii) Domestic Exports by Classes, 1933.

To	Class I. Rs.	Class II. Rs.	Class III. Rs.	Class IV. Rs.	Total Merchandise. Rs.
United Kingdom	85,407,893	6,190,084	346,520	850	91,945,347
British India (including Burma) ...	2,845,919	7,362,908	113,001	2,462	10,324,290
Australia	6,381,258	514,243	36,057	—	6,931,558
Union of South Africa	5,308,574	539,082	8,397	—	5,856,053
New Zealand	4,990,971	29,197	7,113	—	5,027,281
Canada	3,673,535	234,781	18,365	—	3,926,681
Rest of Empire	1,698,950	182,316	111,086	20	1,992,372
<i>Total Empire</i>	110,307,100	15,052,611	640,539	3,332	126,003,582
United States of America	6,873,479	13,155,559	17,362	—	20,046,400
Germany	1,977,451	3,553,234	263,597	3,550	5,797,832
Italy	320,153	3,396,990	14,904	—	3,732,047
France	1,685,113	1,683,118	42,889	—	3,411,120
Belgium	1,293,254	1,383,137	13,487	—	2,689,878
Holland	611,238	2,036,518	30,629	—	2,678,385
Egypt	2,109,884	536,075	4,131	—	2,650,090
Other foreign countries	6,777,635	5,370,340	276,517	2,000	12,426,492
<i>Total foreign countries</i>	21,648,207	31,114,971	663,516	5,550	53,432,244
Ships' Stores	580,714	1,814	92,544	—	675,072
GRAND TOTAL (excluding Parcel Post).	Rs.132,536,021	Rs.46,169,396	Rs.1,396,599	Rs.8,882	Rs.180,110,898
Equivalent to	£9,940,202	£3,462,705	£104,745	£666	£13,508,318

(iii) Principal Domestic Exports, 1933.

Class I.	Article.	Total Quantity.	Total Value. Rs.	Principal countries of destination with amounts in Rs. '000.
Tea—				
Black	...	215,882,444 lb.	117,813,305	United Kingdom (81,431), United States of America (6,534), Australia (6,229), Union of S. Africa (5,200), New Zealand (4,853), Canada (3,491), Egypt (1,941), France (1,207), 'Iraq (704), Argentine (604), India (604).
Green	...	144,861 lb.	74,196	Canada (45), India (29).
		<u>216,027,305 lb.</u>	<u>117,887,501</u>	
Coconuts—				
(a) desiccated	...	39,493 tons	6,746,623	United Kingdom (3,526), Germany (1,196), Holland (401), Spain (231), Belgium (179), France (159), Italy (120), Denmark (116), United States of America (112), New Zealand (107).
(b) fresh	...	21,699,017 No.	577,915	Germany (140), United Kingdom (125), Egypt (124), India (95), Holland (46).
			<u>7,324,538</u>	
Spices—				
(a) Arecanuts	...	104,725 cwt.	1,285,134	India (1,083), Maldives Is. (96), India (excluding British) (85).
(b) Cinnamon quills and chips.	...	48,669 „	987,283	Mexico (234), Spain (147), Germany (125), United States of America (87), United Kingdom (80), Holland (62).
(c) Cardamons	...	3,161 „	338,096	United States of America (82), Germany (35), Sweden (28), Japan (27), Denmark (26), United Kingdom (25), Egypt (19), India (18) Aden (13).
(d) Other, including cloves, ginger, mace, nutmeg, pepper, etc.	...	2,479 „	56,105	India (26), Egypt (6), Malta (2), Argentine (2).
		<u>159,034 „</u>	<u>2,636,618</u>	
Cocoa, raw	...	3,251 tons	1,544,536	Philippine Is. (622), Mexico (252), United Kingdom (189), Australia (120), Canada (57).
Oil seed cake Coconut poonac	...	509,026 cwt.	1,496,038	Belgium (983), France (295), Germany (179).

(iii) *Principal Domestic Exports, 1933—continued.*

<i>Article.</i>				<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of destination with amounts in Rs.'000.</i>
<i>Class II.</i>					<i>Rs.</i>	
Rubber	...	...	...	1,270,682 cwt.	22,995,245	United States of America (11,753), United Kingdom (3,195), Germany (2,504), France (1,264), Belgium (904), Italy (766), Holland (617), Mexico (605), Australia (343), Argentina (223).
Coconut oil	...	...	...	1,061,394 cwt.	10,800,402	India (4,178), United Kingdom (1,919), Italy (799), Egypt (504), Union of S. Africa (456), Sweden (440), Portuguese E. Africa (369), Argentina (362).
Copra	...	...	...	64,340 tons	6,828,435	India (2,589), Italy (1,779), Holland (1,132), Germany (481).
Fibre—						
(a) Coir Bristle	...	...	...	187,288 cwt.	1,096,897	Japan (473), Belgium (175), France (135), United Kingdom (117).
(b) Coir Mattress	...	...	...	357,608 „	475,865	United Kingdom (187), Union of South Africa (66), United States of America (40), Japan (38), Australia (32), Belgium (31), India (23), Germany (19).
(c) Other	...	...	...	1,732 „	60,777	Germany (31), United Kingdom (28).
				546,628 „	1,633,539	
Citronella Oil...	...	...	...	1,459,423 lb.	1,273,832	United States of America (612), United Kingdom (269), Germany (102), India (60), Australia (53).
Plumbago	...	...	...	191,173 cwt.	1,213,561	Japan (455), United States of America (279), United Kingdom (189), Germany (106), France (50).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
1913	58,199,628	113,349,396	28,091,773	199,640,797
1930	63,619,104	169,550,768	91,186,641	324,356,513
1931	41,088,300	116,032,201	71,075,676	228,196,177
1932	37,365,076	93,650,827	65,351,662	196,367,565
Equivalent to...	£2,803,081	£7,025,569	£4,902,601	£14,731,251
1933	31,074,270	83,049,932	63,223,710	177,347,912
Equivalent to	£2,330,570	£6,228,745	£4,741,778	£13,301,093

(ii) *Imports by Classes, 1933.*

<i>From</i>	<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total.</i>
	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
United Kingdom	4,570,927	2,375,969	23,879,828	97,895	30,924,619
British India (including Burma)	56,485,941	6,657,539	6,378,784	75,249	69,597,513
Rest of Empire	9,871,476	2,823,013	628,828	78,102	13,401,419
<i>Total Empire</i>	70,928,344	11,856,521	30,887,440	251,246	113,923,551
Japan	254,174	38,379	12,535,960	119	12,828,632
Persia	156,350	10,786,981	1,852,476	—	12,795,807
Sumatra	83	6,975	7,936,449	—	7,943,507
Java	5,554,132	20,216	24,532	3	5,598,883
Other foreign countries...	9,904,494	3,445,248	10,706,619	620	24,056,881
<i>Total foreign countries</i>	15,869,233	14,297,799	33,056,036	642	63,223,710
GRAND TOTAL	Rs.86,797,577	Rs.26,154,320	Rs.63,943,476	Rs.251,888	Rs.177,147,261
Equivalent to	£6,509,818	£1,961,574	£4,795,761	£18,892	£13,286,045

In addition bullion and specie to the value of Rs.200,651 was imported from the following places:—

	<i>Rs.</i>
United Kingdom	149,651
British India ex Burma	50,000
Mauritius	1,000

(iii) *Principal Imports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of origin with amounts in Rs. '000.</i>
			<i>Rs.</i>	
	Rice	8,797,918 cwt.	44,621,386	India (40,359), Siam (3,870), Cochin-China (375).
	Fish—			
	(a) Dried and Salted ...	290,995 cwt.	5,819,991	India (3,751), Arabia (235), Aden (203), Persia (152).
	(b) Maldive	98,424 „	3,291,446	Maldive Is. (3,259).
	(c) Tinned	5,672 „	149,233	Japan (48), United States of America (37), Canada (20).
	(d) Frozen	945 „	55,687	United Kingdom (48).
	(e) Preserved	10,460 „	48,554	India (46).
		406,496 „	9,364,911	
	Sugar—			
	(a) Refined	57,744 tons	6,065,334	Java (4,599), United Kingdom (685), Portuguese E. Africa (288), Russia (286), Union of S. Africa (105).
	(b) Refined (candy—in lumps and loaves).	794 „	130,409	Straits Settlements (87), Japan (13), India (11) United Kingdom (7), Hong Kong (7).
	(c) Unrefined jaggery ...	875 „	99,049	India (88), Java (10).
	(d) Unrefined, other sorts...	18,576 „	105,216	India (46), Straits Settlements (44).
		77,989 „	6,400,008	
	Curry Stuffs—			
	(a) Chillies	152,337 cwt.	2,744,705	India (2,052), Straits Settlements (648).
	(b) Other kinds	159,022 „	1,433,258	India (915), France (256), Hong Kong (122).
		311,359 „	4,177,963	
	Onions	504,308 „	2,324,356	India (2,254), Egypt (68).
	Pulses	413,939 „	2,218,993	India (1,629), China (539).
	Wheaten Flour	308,308 „	2,202,704	Australia (2,166).
<i>Class II.</i>				
	Petroleum, crude	69,256,992 Imp. gals.	12,466,255	Persia (10,787), Borneo (non-British) (1,679).
	Coal	404,916 tons	7,498,366	British India (4,411), Union of South Africa (1,760), United Kingdom (1,171).
	Fertilizers, all kinds ...	782,323 cwt.	2,825,436	British India (1,300), United Kingdom (766), Germany (182), Egypt (122), Holland (65).
<i>Class III.</i>				
	Cotton yarns and manufactures—			
	Cotton piece goods—		<i>Rs.</i>	
	(a) dyed	26,406,825 yds.	4,741,927	Japan (2,142), India (1,909), United Kingdom (639).
	(b) bleached	16,385,349 „	2,818,674	Japan (1,377), United Kingdom (1,345).
	(c) printed	14,185,148 „	2,226,177	Japan (1,261), United Kingdom (940).
	(d) gray	3,611,064 „	506,069	Japan (291), United Kingdom (160), United States of America (51).
	(e) Other	89,596 „	74,846	India (42), United Kingdom (18).
	Yarn and twist	201,558 „	114,136	India (64), United Kingdom (47).
	Other cotton manufactures	—	1,094,552	United Kingdom (681), Japan (233), India (62)
			11,576,381	
	Petroleum refined—			
	(a) Petrol and Benzine ...	7,628,165 gal.	5,340,956	Sumatra (4,107), Persia (1,234).
	(b) Kerosene	7,376,207 „	4,407,724	Sumatra (3,788), Persia (620).
	(c) Lubricating	648,117 „	810,152	United States of America (381), United Kingdom (352).
		15,652,489 „	10,558,832	
	Tea Chests	—	3,004,691	Japan (982), Finland (715), United Kingdom (401), Estonia (315), Germany (158), Poland (147), Sweden (130).
	Silk and Satin Manufactures	—	2,345,374	Japan (1,808), India (231), United Kingdom (142).
	Motor cars and lorries ...	1,135 No.	1,963,307	United Kingdom (1,617), United States of America (139), Canada (117).
	Rubber tyres	—	1,527,799	United Kingdom (922), Japan (178), Italy (148), United States of America (98).
	Soap (all kinds)	30,690 cwt.	1,436,483	United Kingdom (1,264), United States of America (73), Japan (58).
	Drugs and Medicines (all kinds)	54,063 „	1,411,009	United Kingdom (802), Germany (274), United States of America (170), India (104).
	Artificial Silk Manufactures...	—	1,404,908	Japan (958), India (275), United Kingdom (133).

V.—Natural Resources.

A.

1. AGRICULTURAL.

The natural resources of Ceylon are predominantly agricultural, and of its agricultural products tea is the most important.

From the point of view of acreage tea is only the fourth most important crop, coming after coconuts, paddy, and rubber. The total area under tea in 1933 was estimated at 557,284 acres, about 871 square miles or approximately 3 per cent. of the total area of the Island. From the point of view of the value of the crop, however, no other commodity approaches it. Apart from the tea consumed locally, of which no statistics are available, the amount exported represents nearly 65 per cent. by value of the total exports of Ceylon.

The area under tea consists of about 1,230 estates; most of these are situated over 3,000 feet above sea level, but it can be grown right down to sea level, provided that an average evenly distributed rainfall of 80 to 120 inches is available. The greater part of these estates is owned by limited companies the capital of which is held in the United Kingdom.

The tea after plucking is withered, rolled, fermented, and dried or fired normally in factories on the estate. The amount of made tea produced annually per acre varies between 300 and 1,200 lb., 65 per cent. by value of the total exports of Ceylon.

Quantities of tea exported during the last five years have been as follows:—

			<i>Black tea.</i> †	<i>Green tea.</i>	<i>Total Value.</i> †	<i>Equivalent to</i> †
			lb.	lb.	Rs.	£
1929	...	...	250,430,570	1,157,442	205,194,082	15,389,556
1930	...	...	240,912,984	2,194,490	182,038,751	13,652,906
1931	...	...	242,504,760	1,465,210	138,698,724	10,402,404
1932	...	...	252,361,189	462,566	107,692,146	8,076,911
1933	...	...	215,882,444	178,329	117,909,769	8,843,233

† Including Ships' stores.

It will be observed that a variation of 1d. per pound in the price of tea on the London market represents a variation of £1,000,000 in the value of the annual exports.

Compared with other teas the average price per pound made by Ceylon tea on the London market is somewhat higher than that made by Indian and China teas and a great deal higher than that made by Dutch East Indian tea; the finest qualities of Ceylon tea, however, do not command as high a price as that commanded by the very best Indian and China teas. There is a wide spread between the prices of higher and lower grades of tea.

The average price per lb. of all Ceylon tea exported fell steadily since 1924 when the post-war peak was reached, and reached unprecedentedly low levels towards the end of 1932.

As a result of negotiations between representatives of the Indian, Ceylon, and Dutch East Indies producers (who between them control nearly 90 per cent. of the tea entering world trade) an agreement for a regulation scheme was concluded in February, 1933, and was brought into force by the Governments concerned as from the 1st of April, 1933. Under this scheme exports are restricted by the Government to the agreed quota, the quota for the first year being 85 per cent. of the standard export (i.e., the maximum export of the three years 1929, 1930, and 1931). New planting of tea is restricted and the export of tea seed is prohibited. The scheme is being managed by an International Tea Committee representative of the countries concerned and is to last for five years. Ceylon's standard export is 251,522,617 lb. and her current quota 213,794,225 lb. Since the initiation of the scheme there has been a substantial recovery in prices.

About 95 per cent. of the labour on tea estates consists of immigrant labour from India. An estate requires on an average about 1½ labourers per acre.

There still remains a substantial quantity of land in Ceylon which would be suitable for tea cultivation but is not so employed; it is improbable, however, that such land would produce the best varieties of tea and in any case, so long as the proposals for restriction hold the field, no question of further expansion can arise.

Tea does not come to the bearing stage until from four to five years after the land is first opened and tea planted.

In purchasing a tea estate in normal times, the price may generally be expected to be about 10 times the annual net revenue.

Coconuts.—Although, except for a brief period when the price of rubber was at its lowest, the value of coconut products exported from Ceylon has for a number of years fallen behind that of rubber, coconuts are, from Ceylon's own point of view, much the most important of the Island's agricultural products after tea.

The serious fall in coconut prices has caused much concern to those engaged in the industry as well as to the Government. Record low levels for both copra and coconut oil have resulted in many estate owners being unable to meet interest payments on borrowed capital, and several estates have been sold for abnormally low figures. The prospects of the industry are distinctly gloomy unless steps are taken to raise prices. Measures for rescuing the coconut industry from its present plight are under consideration.

Altogether about 1,100,000 acres are under coconut, but only a part of this acreage is well cultivated on systematic lines. The coconut palm probably produces a greater variety of products than any other plant and several industries are dependent on it.

Coconuts can be grown up to heights of 1,500 feet above sea level, though it is generally considered that they flourish best at sea level. The nuts are certainly smaller at the higher elevations. A well distributed rainfall of from 50 to 90 inches is required.

Land suitable for coconuts is still available in the Island but only in the out-districts where a good deal of pioneering work is necessary. The palms take about 10 years to come to maturity, but this period may be reduced to six years with intensive cultivation. The labour force required may be taken at about one labourer to four or five acres.

Considerable capital both European and Ceylonese is interested in coconut properties and particularly in mortgages thereon. In purchasing a coconut estate in normal times the price may be taken at about 12 times the annual net revenue.

The principal product from the commercial point of view is the nut. The nuts are usually gathered six times a year, the average annual yield per palm being about 40 nuts. Without cultivation the figure is as low as 30, but with cultivation up to and over 80 may be secured. The number of palms per acre varies from 50 to 90 with an average of 70. The average annual yield per acre therefore is in the region of 2,800 nuts.

The nuts are used to some extent for food locally and there is some export of whole nuts, but the principal use is for the manufacture of **copra**, the dried kernel of the nut. The copra is normally manufactured on the estates where the nuts are grown but some of the smaller properties sell their nuts to manufacturers. The number of nuts required to manufacture a ton of copra varies from 3,600 to 6,000 nuts.

The greater part of the copra produced is exported, but a considerable quantity is crushed locally for the production of **coconut oil**. The residue, or cake, locally called **poonac**, is widely used locally either as cattle food or as manure, but a certain amount is also exported.

While the traditional method of crushing copra by bullock power still survives, most of the manufacture is now done by hydraulic presses and expellers of modern design.

The greater part of the coconut oil produced is exported but some is consumed locally. No figures relating to local consumption are available.

Desiccated coconut, the powdered dried flesh of the coconut, is produced in Ceylon on a large scale, almost entirely for export; conditions are favourable as fresh nuts are essential to the success of the manufacture and the mills are situated conveniently near the estates. Mills, many with elaborate machinery, have been erected in almost every coconut-growing district.

The manufacture of **coir**, the stout fibres forming the husk of the nut, is an important but somewhat unorganized industry. The husks are retted in water and the fibres are then separated either by special machinery or by being beaten out by hand. In many parts of Ceylon the process is carried out by village labour, chiefly women, and the resultant fibre sold to the exporting firms, but mills have been established at several places.

The fibre, after separation, is graded and used for making brushes, mats, rope, yarn, etc. Much of it (though no exact figures are available) is used locally, but there is considerable export of bristle fibre, mattress fibre, and coir yarn.

The production of **toddy** and **arrack** form two important industries dependent on the coconut palm. The nuts are formed at the top of the tree on stalks enclosed in spathes. These spathes contain a considerable quantity of saccharine juice and if they are tapped before the nuts mature a quantity of this juice can be drawn off and collected in a pot. Unless prevented by chemical methods this juice ferments and becomes toddy with an alcoholic strength of 4 to 8 per cent. Toddy is also obtained similarly from the palmyra and kitul palms. It is sold in taverns under Government licence and the revenue derived from it is an important item in the public finances.

The toddy consumption in 1932-33 was 4,033,865 gallons compared with 3,655,540 gallons in 1931-32, the average consumption per head of population being 0.79 and 0.69 gallons respectively. The actual toddy revenue collected in the two financial years was Rs. 1,637,116 in 1931-32 and Rs. 2,040,080 in 1932-33.

By the distillation of coconut toddy the local spirit known as "**arrack**" is produced, about 8 gallons of toddy being required to produce a gallon of arrack of proof strength, and this is sold like toddy in taverns licensed by the Government. Distillation of arrack prior to 1923 was carried on in about 250 small pot-stills of the most primitive variety; it is now concentrated in eight large modern distilleries owned by Ceylonese capitalists, which sell their output to the Government at a fixed price. The Government stores and matures the spirit in bond, carries on reducing, blending and bottling operations and sells the product to licensed retailers at a considerable profit.

The estimated net revenue derived by the Government from the arrack business in 1932-33 was Rs. 4,075,000, as against Rs. 5,120,520 in 1931-32.

The export trade in arrack—with British India and the Straits Settlements—now appears to be insignificant, the exports during 1932 and 1933 having fallen considerably. The figures relating to the quantity and value of exports of this commodity for the last five years are shown below:—

				Gallons	Rs.
1929	...	...	...	3,832	68,976
1930	...	...	...	3,814	68,652
1931	...	...	...	2,274	38,867
1932	...	...	...	200	3,300
1933	...	...	...	159	1,900

Another by-product of toddy is **toddy vinegar**, which is obtained from the aceticization of fermented toddy. The process is carried on by a limited number of licensed manufacturers under careful Government control. The supply is not yet equal to the demand.

Exports of Coconut Products during Recent Years.

Copra.				Desiccated Coconut.		Coconut Oil.	
		Cwt.	Rs.	Cwt.	Rs.	Cwt.	Rs.
1929	...	2,042,488	26,315,987	690,469	11,875,780	878,523	18,024,359
1930	...	1,812,601	18,028,725	704,690	10,035,931	763,779	13,189,849
1931	...	1,877,303	12,715,258	669,327	6,832,308	962,774	12,130,476
1932	...	913,987	8,284,294	599,266	7,150,151	1,025,040	14,475,109
1933	...	1,286,791	6,828,435	789,850	6,746,623	1,061,394	10,800,402

Exports of Coconut Products during Recent years—continued.

<i>Fresh Coconuts.</i>				<i>Poonac (coconut cake).</i>		<i>Bristle Fibre.</i>	
	<i>No.</i>	<i>Rs.</i>		<i>Cwt.</i>	<i>Rs.</i>	<i>Cwt.</i>	<i>Rs.</i>
1929 ...	20,821,284	1,281,910		333,424	2,114,898	199,923	1,713,667
1930 ...	20,750,337	972,115		278,878	1,254,177	171,217	1,345,344
1931 ...	21,142,176	759,461		370,637	1,353,020	169,437	1,076,500
1932 ...	23,144,466	1,135,545		433,707	1,765,662	171,238	1,210,351
1933 ...	21,699,017	577,915		509,026	1,496,038	187,288	1,096,897
<i>Mattress Fibre.</i>				<i>Coir Yarn.</i>		<i>Coir Rope.</i>	
	<i>Cwt.</i>	<i>Rs.</i>		<i>Cwt.</i>	<i>Rs.</i>	<i>Cwt.</i>	<i>Rs.</i>
1929 ...	395,468	812,763		100,635	1,837,568	14,955	209,470
1930 ...	309,917	387,962		104,377	1,313,549	11,880	159,458
1931 ...	323,787	412,754		82,413	842,396	8,734	109,718
1932 ...	278,266	280,016		72,977	616,516	8,612	107,688
1933 ...	357,608	475,865		89,093	709,769	8,433	80,225
<i>Total Value of Exports of Coconut products in</i>							
	<i>Rs.</i>	<i>Equivalent to £</i>			<i>Rs.</i>	<i>Equivalent to £</i>	
1929 ...	64,186,402	4,813,980		1932 ...	35,025,332	2,626,900	
1930 ...	46,687,110	3,501,533		1933 ...	28,812,169	2,160,913	
1931 ...	36,231,891	2,717,392					

Rubber.—Some 534,000 acres are planted with the para rubber tree (*Hevea brasiliensis*) from which rubber, that is the coagulated latex of the tree, is obtained by tapping the trunk. The latex is collected, removed to the factory, which is always installed on the estate, treated with acetic acid to cause coagulation, dried and crêped by machinery or coagulated in sheets and smoked.

The rubber tree flourishes at low altitudes, usually below 2,000 feet and requires a well distributed rainfall of not less than 80 inches per annum. It is generally propagated by seed in nurseries and planted out when eighteen months to two years old. Tapping generally commences when the trees are six or seven years old. Daily tapping was formerly common, but alternative day tapping is now generally popular and tapping every third day is adopted on some estates.

The trees are usually planted out at intervals of 24 by 12 feet. The yield of rubber per acre varies, according to a number of factors, from 150 to 700 lb. per acre, 400 to 500 lb. being considered a good all-round yield for an estate in full bearing. A very good tree over twelve years old will yield 10 lb. of dry rubber per annum, while the average yield per tree in full bearing may be put at about 4 to 5 lb. per annum. Much higher yields are however obtained from bud-grafted trees. It is estimated that yields of 1,000, 1,500, and even 2,000 lb. per acre may be obtained by estates adopting bud-grafting on a large scale. As a means towards reduction of cost of production the value of bud-grafting cannot be over emphasised.

The labour engaged is composed of Sinhalese and immigrant Indian Tamils. The usual requirement of labour is one labourer to 3 acres of rubber.

Considerable work has been done since 1929 to improve the plantations and the output by budding and this work is now beginning to bear fruit.

The disastrous fall in the price of rubber since the peak was reached in 1925 has been one of the most marked features of the depression. In anticipation of restriction, price improved in 1933 to 16 cents per lb. as compared with 12 cents in 1932.

Exports in recent years have been as follows:—

	<i>lb.</i>	<i>Rs.</i>	<i>Equivalent to £.</i>
1928 ...	128,326,444	73,985,953	5,548,946
1929 ...	180,632,140	86,630,874	6,497,316
1930 ...	170,946,243	47,158,226	3,536,867
1931 ...	138,004,736	19,841,665	1,488,125
1932 ...	111,241,860	13,232,696	992,452
1933 ...	142,317,027	22,995,245	1,724,643

Consumption of raw rubber within the Island may be taken as negligible or even non-existent.

Cocoa.—Some 34,000 acres in Ceylon are under *Theobroma cacao*, the cocoa tree. The variety now grown in Ceylon is the *Forastero*.

The amount of suitable land is limited; the tree will not grow below 500 feet or above 2,000 feet above sea level and an average rainfall of between 60 and 80 inches is required.

The trees are generally planted 15 by 15 feet apart, they come into bearing about the 5th year and yield two crops a year, the smaller "spring" crop, picked in May to July, and the main or "autumn" crop picked in November to January. The average yield per acre varies considerably in Ceylon; the general average is about 3½ to 4 cwt. per acre, although some well-cultivated estates have reached the very high annual average of 8½ cwt. per acre.

In purchasing a cocoa estate in normal times the price may be taken at about 7 times the annual net revenue.

The labour force required is about one labourer for each two acres.

The fruit of the tree is a pod of considerable size containing beans covered with pulp or mucilage, and grows direct on the trunk or branches of the tree.

The pods are lopped off and opened the same day and the beans are carried to the fermenting shed. Here they are fermented for about 36 hours to remove the pulp. They are then washed and removed to the barbacue or curing house where they are gradually dried. The best method is to dry the beans in the sun on barbagues covered with coir matting, the process taking about 5 to 7 days, according to the temperature, but in Ceylon most of the picking has to be done in the wet season and the beans are therefore cured by hot air in buildings at a temperature of about 110° to 120° F.

After curing they are sorted into three grades (1) large, round beans, (2) flat, small beans, (3) "garblings" or shells and broken beans, and packed into bags of 112 lb. each for export.

The whole crop is exported. The most important purchaser of Ceylon cocoa is the Philippines; the major portion of the remainder of the crop is taken by Mexico, the United Kingdom, Australia, Canada, Belgium, Italy and the United States.

The price of Ceylon cocoa shows extraordinary variations, but is usually substantially above that of West African and below that of the best qualities of West Indian and Central American.

The total amount of exports in recent years has been as follows:—

			<i>lb.</i>	<i>Rs.</i>	<i>Equivalent to £</i>
1929	...	...	9,260,112	4,236,136	317,710
1930	...	...	8,648,084	2,936,789	220,259
1931	...	...	8,587,254	2,319,879	173,991
1932	...	...	9,242,938	2,192,357	164,427
1933	...	...	7,282,218	1,544,536	115,840

Cinnamon.—Cinnamon, which was once the main export of the Island, is still a minor export. Some 26,000 acres are still under this tree. The tree may grow to a height of 20 to 30 feet and the trunk may be upwards of 3 feet in circumference. The trees cultivated to produce the cinnamon of commerce are coppiced and long willowly shoots are produced growing to a height of about 10 feet, two or three inches in circumference.

In favourable circumstances, branches may be cut from the fourth year, the season for cutting being May to October.

After the shoots have been cut the bark is peeled off, replaced round the stick and left for 3 to 6 hours to ferment. It is then skinned, all that is left being a strip of pale yellow colour and parchment-like texture. After it has been left for a further half-hour to ferment and dry, the smaller pieces are inserted into the larger and the "quills," which are about four feet long, are formed, rolled into shape and made up into bundles.

The smaller fragments are exported as chips.

Cinnamon oil is distilled from the chips and trimmings of the quills as well as from the leaves.

The annual output per acre may be estimated at about 120 lb. of quills.

The principal destination of exports is Mexico, the others being usually Spain, the United States of America, Germany, and the United Kingdom.

Total exports during recent years have been as follows:—

			<i>Quills.</i>			<i>Chips.</i>		
			<i>Cwt.</i>	<i>Rs.</i>	<i>Equivalent to £</i>	<i>Cwt.</i>	<i>Rs.</i>	<i>Equivalent to £</i>
1929	...	...	37,069	3,566,735	267,505	11,158	217,705	16,328
1930	...	...	35,915	1,683,713	126,278	8,234	96,270	7,220
1931	...	...	35,261	1,115,756	83,682	6,680	61,628	4,622
1932	...	...	40,166	948,518	71,139	8,101	44,380	3,329
1933	...	...	41,224	954,573	71,593	7,445	32,710	2,453

			<i>Cinnamon Oil.</i>			<i>Cinnamon Leaf Oil.</i>		
			<i>Oz.</i>	<i>Rs.</i>	<i>Equivalent to £</i>	<i>Oz.</i>	<i>Rs.</i>	<i>Equivalent to £</i>
1929	...	...	181,068	45,267	3,395	624,592	137,408	10,306
1930	...	...	55,496	29,650	2,224	1,418,576	299,316	22,449
1931	...	...	194,001	388,003	29,100	2,059,366	411,869	30,890
1932	...	...	13,219	21,944	1,646	2,312,432	393,726	29,529
1933	...	...	9,769	10,624	797	2,609,952	313,887	23,542

Citronella oil.—Citronella oil grass is a large coarse grass growing 3 to 4 feet high, and cultivated for its essential oil, which is obtained from the leaves by distillation. It grows in any ordinary soil, and thrives best in a moist, hot atmosphere. It flourishes up to 2,000 feet above sea level, but in Ceylon is confined to the south-west coast where about 33,000 acres are under this crop. It is readily propagated by division and may be planted in rows about 2 by 3 feet apart.

The clumps are ready for cutting in about eight months from the time of planting. Two cuttings a year may be obtained and the estimated annual yield is about 40 lb. of marketable oil per acre.

The whole industry is in Ceylonese hands.

The whole output is exported, the principal destinations being the United States of America and the United Kingdom.

Total exports during recent years have been as follows:—

			<i>lb.</i>	<i>Rs.</i>	<i>Equivalent to £</i>
1929	...	...	1,183,239	1,226,452	91,984
1930	...	...	1,213,542	1,346,034	100,953
1931	...	...	1,203,482	948,298	71,122
1932	...	...	1,279,801	1,202,918	90,219
1933	...	...	1,459,423	1,273,832	95,537

Tobacco.—Tobacco is grown in all provinces, and in some areas the industry is an important one.

It is estimated that the area under cultivation in 1933 was about 14,000 acres. In the central Province, particularly in the Kandy and Natale districts a higher grade of leaf is grown. The area under cultivation fluctuates from year to year, as after tobacco the land is generally put under other crops and then allowed to lie fallow before another crop of tobacco is taken off it.

The finest grade is *Dumbara* tobacco grown principally in the Kandy district but also in other areas. The leaf burns with a good white ash but is too thick in texture and unsatisfactory in flavour to be of value on the United Kingdom market, although it is smaller and of finer texture than the Jaffna type of leaf.

It is manufactured locally into cigars, which command a ready sale. In some cases the cigar is composed entirely from Dumbara leaf, but the greater part of the crop is sold to local manufacturers of cigars, who use it as a wrapper for fillers of Jaffna tobacco.

Jaffna tobacco consists of two kinds, locally known as the smoking and chewing types. Both are large-leaved coarse tobacco, the chewing type being the coarser of the two. The curing of the two types requires different treatment.

The smoking tobacco is sold to manufacturers for the local manufacture of "Jaffna cheroots". Some of the chewing types are sold locally for chewing with betel leaf, lime, and arecanut, but the bulk of this type is exported to Travancore where it is much sought after. Jaffna tobaccos are sold not by the pound but by the leaf, the average price being about Rs.20 to 40 per 1,000 leaves.

Some years ago the growing of White Burley tobacco was commenced at the Government Experimental Station in the Jaffna Peninsula and the cultivation of this type is gradually extending in that district. The Government has evolved a purchase scheme for the crop, which commands a good price in the United Kingdom. The exports of this tobacco have been as follows:—

	lb.		lb.		lb.
1924 ...	4,701	1927 ...	13,328	1930 ...	18,652
1925 ...	15,057	1928 ...	30,688	1931 ...	9,212
1926 ...	18,535	1929 ...	25,312	1932 ...	10,901
				1933 ...	14,933

Exports of domestically produced tobacco during recent years have been as follows:—

<i>Unmanufactured Tobacco.</i>			<i>Cigars.</i>		
	lb.	Rs.		lb.	Rs.
1929 ...	3,193,567	572,202	1929 ...	8,469	59,283
1930 ...	1,294,138	435,920	1930 ...	8,161	19,800
1931 ...	2,584,480	1,377,771	1931 ...	5,066	4,608
1932 ...	1,621,929	994,402	1932 ...	5,016	4,674
1933 ...	2,165,540	977,777	1933 ...	6,530	6,138

Cardamoms.—The cardamom plant (*Elettaria Cardamomum*), grows in stools or clumps under the shade of forest trees at elevations between 2,800 and 4,000 feet in areas where the rainfall is from 115 to 150 inches a year. The area under this crop is about 6,000 acres.

The commercial part of the plant is the fruit, which is used as a spice and also, in the pharmacopoeia as a deadener of tastes and a medicine.

The fruit is collected by women and children and manufactured into either (1) bleached or (2) green dried. In the former case the fruit is dried, soaked, and bleached in sulphur fumes, the process being repeated until the required pale colour is secured, and the ends are clipped off either by hand or by machine. In the latter case the fruits are merely dried in the sun.

There are no records of the quantities consumed locally. The most important countries of destination of exports are Germany and the United Kingdom.

Total exports during recent years have been as follows:—

	Cwt.	Rs.	Equivalent to £.
1929 ...	2,849	647,094	48,532
1930 ...	2,801	453,921	34,044
1931 ...	2,712	374,523	28,089
1932 ...	2,687	372,715	27,954
1933 ...	3,161	338,096	25,357

Arecanuts.—The arecanut palm is grown in all village gardens in the wetter districts of the Island. It produces heavy crops of fruit and provides straight stems which are used for the erection of temporary structures. The area under this palm is about 69,000 acres.

The palm is seldom grown in pure plantations unmixd with other trees, and, though several varieties are grown, little care has been taken to select the fruits of the best varieties for planting.

The fruits are harvested when ripe and sold in their unhusked state in all the bazaars and markets of the Island. The dried product is also readily procurable. It is cut into thin shavings which are used for chewing with the betel leaf, lime and occasionally tobacco.

No statistics of local consumption are available.

Exports are considerable, about 84 per cent. of the total in 1933 going to India and 8 per cent. to the Maldiv Islands. The grant of a preference in India as part of the Ottawa settlement has not yet resulted in an appreciable increase in the exports to that destination.

Exports in recent years have been as follows:—

	Cwt.	Rs.	Equivalent to £.
1929 ...	144,169	2,699,085	202,431
1930 ...	113,067	2,621,308	196,598
1931 ...	101,916	1,677,954	125,847
1932 ...	99,185	1,399,815	104,986
1933 ...	104,725	1,285,134	96,385

Rice.—Two kinds of rice are grown in Ceylon, ordinary paddy and hill paddy or *elvi*; of these the first is much the most important.

The varieties of ordinary paddy grown in Ceylon fall into three groups maturing in (1) six months or more, (2) four to five months, and (3) three months or less.

Successful cultivation depends entirely on an abundant water supply. In some districts reliance is placed solely on rain-water, while in others rain is supplemented by supplies from springs, streams, wells, and tanks.

The crop is reaped with the sickle, and generally threshed by being trodden out by buffaloes or cattle on the threshing floor and then winnowed by hand.

There are two paddy-growing seasons and when sufficient labour and water are available two crops are taken off each holding annually. The Maha crop is sown from the end of August to the middle of October according to the district and reaped in February or March. The Yala crop is sown in March and April and reaped in July to September.

Paddy is usually converted into rice by pounding in a mortar, but paddy mills are now being gradually introduced.

The area under wet land paddy in Ceylon is estimated to be 850,000 acres yielding approximately 12 to 13 million bushels of paddy per annum. The returns per acre are small compared with other rice-producing countries, and the profits realized have been insufficient to attract capital and organization. Ceylon has been accustomed to draw the majority of its requirements from India, but increasing attention is now being devoted to placing the local industry on a more satisfactory and profitable basis.

Hill paddy or *elvi* is grown on dry lands, usually on hilly lands where no reliance can be placed on an abundant rainfall. Yields, if the season is favourable, are generally heavy and the rice is highly prized. No statistics of the area under cultivation or total yield appear to be available.

Practically all the rice grown is consumed in the Island, and exports are negligible.

Minor food crops.

While rice is much the most important food crop grown in Ceylon, considerable quantities of other food crops are grown, mostly for local consumption.

Except in the Northern Province field crops are generally grown in *chenas*, areas of land covered with secondary forest or other vegetation, which are cleared and burnt.

The principal food crops are the following:—

- (a) *Grains*, viz., kurrakan (*Eleusine coracana*), maize, Italian millet, *Paspalum* millet, and *Panicum* millet.
- (b) *Pulses* viz., green gram, horse gram, and black gram.
- (c) *Gingelly* (*Sesamum indicum*).
- (d) *Edible tubers*, viz., dioscorea, tannia and other yams, sweet potatoes, and manioc or cassava.
- (e) Plantains (bananas) of various kinds.
- (f) Jak and bread fruit.
- (g) Vegetables and curry plants, in particular chillies, onions, pumpkins, gourds, cucumbers and, in the hill districts, European vegetables of various kinds.

Minor agricultural products.

Fibres.—Several fibres grow readily in the Island and are exploited on a small scale for local requirements.

Several species of *Sansevieria* (bow-string hemp) grow commonly in many areas and are utilized by the villagers. Mauritius hemp (*Furcraea gigantea*) has been established in the Island for a century but has been exploited only in recent years. The leaves of the wild plants are collected and the fibres are beaten out by hand, dried and made into twine or ropes or woven into thin mats or bags.

Considerable success was attained a few years ago in establishing a cotton industry in the Hambantota District in the south of the Island and the area cultivated in 1930 was over 2,000 acres, but within recent years the area under cotton has decreased considerably.

The crop is used locally. Local Cambodia seed is distributed, and yields vary from 1 to 4 cwt. per acre with an average of 2 cwt.

Fruit is grown, but is generally speaking of poor quality and the supply is irregular.

The papaw tree has been grown in considerable quantities, and forms a suitable catch crop in the early years of tea and rubber plantations. In addition to the demand for direct consumption, the fruit on being tapped yields papain in marketable quantities.

2. FORESTRY.

Ceylon has relied very largely in the past on imports to meet the requirements for railway sleepers, building construction and cheap utility timbers.

The broad policy now aims at making the Island self-supporting in its timber requirements. This policy primarily involves a knowledge of the timber resources of the country. The forests can roughly be classified into four zones (a) Dry Zone, (b) Wet Zone, (c) Intermediate Zone, (d) Montane Zone.

The Dry Zone forests situated in the north and east of the Island contain the more valuable hardwoods, suitable for railway sleepers, heavy building and construction, and carriage and wagon building.

The Wet Zone forests situated in the south-west of the Island contain valuable semi-hard and soft woods, some of which, after impregnation, will undoubtedly be suitable for supplementing the supplies of the dry zone hardwoods for the purposes named, while others should be suitable as cheap utility timbers.

The Intermediate and Montane Zone forests which occupy the central part of the Island contain timbers of little economic value, except as firewood, and the policy is to replace them with utility timbers which can be put on the market at a competitive price.

Steps are now being taken to examine and bring under proper forest working plans all areas which have been set aside for intensive management, and a start has been made in the Wet Zone areas, which are considered to be commercially more important.

The sale of the right to work Coupes in the Dry Zone with payment on outturn was commenced in 1933, and has continued with marked success up to the present. As a consequence more than 1-5th of the Railway Departments requirements in sleepers was met during 1933 and approximately two-thirds of the 1934 requirements up to the end of August, 1934.

In addition a large quantity of timber has been supplied to Public Departments.

It is anticipated that the whole of the Railway Department's requirements in sleepers, and Public Departments' requirements in timber will be met during 1935.

Since the inception of the scheme operations have been confined to forests on the released list, but steps are being taken in the near future to commence the systematic exploitation and improvement of Reserves and Proposed Reserves with a view to maintaining the supplies indicated above in perpetuum.

Any shortfall in the annual output from these Dry Zone areas, though not foreseen at present, can be met from the Wet Zone forests with suitable impregnated timbers, if found necessary.

An interim report on the Hora under test at Forest Products Research Laboratory, Princes Risborough, Bucks, England, 1933, was received from the Director during the year, and results though encouraging in some respects are disappointing in others. Tests are proceeding with a view to determining the suitability of the timber for flooring, motor vehicle body work, building requirements, decking and veneer, and ply-wood. Flooring tests to date may be considered satisfactory, but the veneer, and ply-wood tests are distinctly discouraging owing to an unusually large wastage factor of 50 per cent. of the area in consequence of its strong tendency to split. Since the receipt of the report a request has been made that a quantity of the timber be sent to a firm manufacturing ply-wood tea chests.

3. ANIMAL HUSBANDRY.

The total number of live-stock in the Island in 1933 was estimated at :—

Buffaloes	529,119	Horses	1,100
Neat cattle	1,084,997	Sheep	58,770
Goats	206,072	Swine	19,000

The animal industry is in a very undeveloped condition. Live-stock do not play any important part in the tea and rubber industries and in coconut planting they are unimportant save as a source for manure. They are, however, very important in the cultivation of the soil for paddy-growing. The great majority of the people being Buddhists, there is a marked disinclination to utilize any product the preparation of which has entailed the taking of life.

Apart from the cattle market at Colombo, markets, centres, and factories are practically non-existent. Attempts to establish local cattle fairs in 1929 and 1930 were not successful.

There are a few tanneries, not in a very thriving condition.

The Island is largely self-supporting in livestock. Meat is low in price and quality. Draught cattle for carting and ploughing are bred locally. Cattle are not bred specially for the butcher, requirements being met from surplus stock unsuitable for carting or ploughing. A little frozen meat is imported, rather more substantial supplies of bacon, ham, and pork and very substantial supplies of dairy produce.

Fresh milk is scarce and expensive, and large quantities of tinned milk are imported. Very little butter and cheese is made. Ghee is made, but in insufficient quantities, and is supplemented by imports from India.

With a view to encouraging local goat farming a scheme for gradual restriction of imports was introduced in 1932. It should also be possible to make the Island self-supporting in eggs and poultry, but collecting and marketing requires organization.

There is no prospect in the near future of developing an export trade. Raw hides and skins are exported, the value of exports in recent years being as follows :—

	<i>Rs.</i>	<i>Equivalent to £.</i>		<i>Rs.</i>	<i>Equivalent to £.</i>
1929	1,096,770	82,258	1932	423,046	31,728
1930	923,746	69,281	1933	298,075	22,356
1931	517,451	38,809			

but this trade is showing no signs of expansion.

4. MINERALS.

Ceylon contains considerable mineral wealth, but no mineral, the export of which commands a ready sale, in really substantial quantities.

The most important mineral is graphite or plumbago, which is found in veins from a few inches to several feet in width, either pure or in association with other minerals.

The most important use of plumbago is for the manufacture of crucibles; it is also used in the manufacture of furnace-facings, electrodes, stove polish, lubricants, black paint and lead pencils, and in electroplating.

At one time Ceylon was the principal world source of supply of plumbago and exports reached a very high figure; the trade then fell away over a period of years, but recovered to a large extent during the War, when the demand for plumbago for use in the manufacture of munitions was very great. Since the end of the War the demand for Ceylon plumbago has fallen away almost entirely, partly owing to the reduced scale of metallurgical manufacture but principally owing to the fact that the deposits which were recently discovered in Madagascar provide a class of plumbago which is equally suitable for the manufacture of crucibles for high temperature smelting and more durable.

During the War there were a large number of mines at work, but by the end of 1933 the number reported working was 57 employing about 1,311 men, and it is not improbable that these were not all open simultaneously. Almost the whole industry is in Ceylonese hands.

The present level of prices is barely remunerative but a recovery in production is possible in view of the increased demand from Japan, Germany and the United States of America.

The following are the exports during recent years :—

	<i>Cwt.</i>	<i>Rs.</i>	<i>Equivalent to £.</i>
1929	254,776	2,729,639	204,723
1930	174,478	1,775,317	133,149
1931	134,413	1,225,331	91,900
1932	122,009	1,023,283	76,746
1933	191,173	1,213,561	91,017

As a general rule prior to 1932 nearly half the total exports of plumbago went to the United States of America. Since 1932, the principal buyer has been Japan, with the United States of America, United Kingdom, and Germany next in the order named.

Precious stones are found in considerable quantities in Ceylon, almost entirely in alluvial gravels.

The most important stones are sapphire, ruby, chrysoberyl (including cat's eye and alexandrite), beryl or aquamarine, and the semi-precious stones topaz, spinel, garnet, zircon, quartz of various colours (cairngorm, citrine quartz, amethyst), and moonstone.

Mining for gems is carried out almost entirely by Sinhalese on a co-partnership system, the stones being bought up by dealers to be cut and polished before export. Many of the best stones are exported to Europe and America but the inferior sorts are largely sold locally or in India. As these exports do not appear in the published trade statistics, presumably owing to the fact that all precious stones are exported by letter or parcel post or as personal luggage, it is difficult to frame any accurate estimate of the value of the annual output but it has been estimated as in the region of Rs.2,000,000 (£150,000).

The output naturally fell off in recent years when the demand was small and prices low, but the industry has shown signs of revival recently.

A number of minerals containing *thorium* and *uranium* have been found in alluvial gravels and the parent pegmatite veins. Thorianite and thorite containing a very high proportion of thorium were at one time produced in commercial quantities and between 1920 and 1927 substantial quantities of monazite sands containing about 9 per cent. of thorium were collected on sea-beaches on the western side of the Island and exported. The price, however, fell heavily and in 1927 operations were abandoned.

The principal use of thorium is for the manufacture of incandescent gas mantles.

At various points on the coast there are heavy black sands on the foreshore, the removal of which is subject to licence under Ordinance No. 6 of 1926. The black colour is due to the predominance of *ilmenite* which is the most valuable constituent of these sands.

Ilmenite is a titanate of iron used largely as a source of titanium oxide, which can be used as a substitute for white lead or zinc in pigments and possesses certain advantages over those compounds. Several large deposits of these black sands have been discovered, the most important at Pulmoddai, 35 miles north of Trincomalee, where it is estimated that there are at least 2 million tons of ilmenite.

A small amount of *mica*, mostly in the form of phlogopite or "amber mica" has been produced from deposits in pegmatite veins or on the boundaries of limestone bands. The deposits are very irregular and only small quantities have been produced.

Other minor mineral products are kaolin of good quality, white quartz sand suitable for manufacturing common glass, limestone suitable for the manufacture of cement, coral which is extensively burnt for lime, various building stones, pottery clays of poor quality and brick-earth.

5. FISHERIES.

The demand for fish in Ceylon greatly exceeds the local supply as shown by the following table of imports of dried fish products for the years 1929-33 inclusive:—

			<i>Cured Fish.</i>		<i>Maldivé Fish.</i>		<i>Total Value.</i>
			<i>Cwt.</i>	<i>Rs.</i>	<i>Cwt.</i>	<i>Rs.</i>	<i>Rs.</i>
1929	...	...	372,188	3,733,723	81,742	6,535,198	10,268,921
1930	...	...	338,840	5,084,686	68,799	5,617,013	10,701,699
1931	...	...	315,653	7,041,973	75,462	4,361,543	11,403,516
1932	...	...	320,579	6,417,810	82,548	3,104,183	9,521,993
1933	...	...	290,995	5,819,991	98,424	3,291,446	9,111,437

The traditional methods of fishing in Ceylon are net-fishing from the shore or catamarans and line-fishing from outrigger canoes in the deeper waters, but these methods are antiquated and inadequate and in consequence the industry is not keeping pace with the demands for fish. Consequently in its present condition the industry is not sufficiently attractive as a trade and the younger generation are abandoning fishing for more congenial employment.

The waters of Ceylon abound in both surface and bottom feeding fish of high edible value; and the Fisheries Department since its inception in 1920 has devoted considerable attention to the modernization of the industry. In the first instance it concentrated on a fisheries survey of the coastal waters with a view to ascertaining the fish fauna and also of inquiring into the possibilities of trawl fishing. Two extensive fishing banks have been discovered, which are practically virgin ground, the Pedro bank off the north-east corner of the Island and the Wadge bank off Cape Comorin, Southern India, with an approximate area of 1,000 and 4,000 square miles respectively. Sample trawls taken on both these banks have shown excellent catches of good edible fish, and a local company which commenced trawling operations in 1928 for marketing fish at Colombo, has met with a certain amount of success.

A detailed survey of the Pedro Bank has already been carried out and accurate fishing charts have been prepared together with a report on the trawling operations. A similar survey of the Wadge Bank was started but has been suspended for the present owing to financial stringency. The desirability of making extensive experiments with modern fishing appliances has also been under consideration for some time. For financial and other reasons an opportunity to make experiments on these lines has not yet presented itself but it is desirable that such experiments should be made as soon as possible as any improvement in the condition of the fishing industry would appear to depend upon the introduction of modern methods. The Fisheries Department is now investigating the possibility of developing the fresh-water fisheries of the Island by the introduction of fish-farming methods.

Pearl Fishery.—The Ceylon pearl oyster, which has been fished for at least two thousand years, is to be found on the famous Ceylon Pearl Banks off the west coast of Ceylon extending from Puttalam to Adam's Bridge, which are under Government control, the fishing rights being held by the Government. No fishery has been held since 1925 and no fishable oysters are at present in the banks. There are therefore no prospects of immediate fisheries.

Chank Fisheries.—The chank shell, which has considerable value in India where it is cut and carved into bangles, is fished annually in the shallow waters of the Palk Strait, north of Adam's Bridge, where it occurs in great abundance. The fishery is not controlled by the Government but a duty is levied on all chank shells exported. The duty was increased in 1929, the old rate having been Rs.2 to Rs.6 per 1,000 and the new rate being Rs.5 to Rs.25 per 1,000 according to quality.

In 1930 a part of the Pearl Banks was for the first time thrown open to chank fishing between 31st January and 30th April.

Exports of chank shells during recent years have been as follows:—

	No.	Rs.	Equivalent to £.
1929	1,538,940	76,947	5,771
1930	2,193,967	121,567	9,118
1931	1,340,440	56,232	4,217
1932	1,326,846	49,627	3,722
1933	1,128,564	31,440	2,358

Window-pane oyster Fishery.—This is a minor fishery which takes place at Lake Tamblegam, a backwater of Trincomalee Harbour. The window-pane oyster is fished for its pearls which, however, are not of good quality. They are used for cheap jewellery and for indigenous medicinal purposes. The fishery is a Government monopoly and the fishing rights are leased when oysters are present in sufficient numbers.

6. MISCELLANEOUS.

Salt.—The manufacture, collection, and sale of salt is a Government monopoly in Ceylon, protected by an import duty.

Ceylon consumes about 660,000 cwt. of common salt per annum. The greater part of this is manufactured locally, any shortages being met by importation from India, or elsewhere.

Salt is manufactured:—

- (a) from sea water by solar evaporation at the Government Salterns,
- (b) in the same way in certain private salt pans, and
- (c) by natural evaporation in certain lagoons.

The production and imports for the years 1929-33 were as follows:—

	Production	Imports
	Cwt.	Cwt.
1929	501,692	—
1930	190,659	—
1931	896,375	—
1932	354,051	—
1933	164,444	35,888
	<u>2,107,121</u>	<u>35,888</u>

The short production over these years necessitated importation of salt from Port Said, towards the latter part of 1933, to the extent of 35,888 cwt. The stocks at the end of 1933 amounted to 295,264 cwt.

B.

FOOD SUPPLY.

Ceylon is very far from being self-supporting in food-stuffs, very large quantities of such important staples as rice, fish, sugar, and curry stuffs and smaller quantities of vegetables and wheat flour being imported annually, the principal source of supply, except in the case of sugar, being India. With a view to encouraging the growing of vegetables for food, the import duty on fresh vegetables was considerably increased at the end of July, 1934. Protective duties were similarly placed on eggs, ghee, ginger, and edible fish oils.

There is no immediate prospect of sufficient supplies of at any rate rice and sugar being produced locally and the extent to which the Island could be made self-supporting in the other commodities mentioned remains very problematical.

Having regard to the steady increase in the population the disproportion between local supplies and requirements is likely to increase rather than the reverse.

VI.—Industry.

There are no industries in Ceylon in the accepted sense of the term but there are a great many small factories and mills which are engaged in the preparatory processes relating to the Island's export products. There are also a few engineering establishments and repair shops in addition to a large number of domestic workshops. In 1921 about 12 per cent. of the total occupied population were engaged in such undertakings. The establishments may be classified as follows:—

- (1) Factories, etc., engaged in the preparation of local agricultural produce for export or consumption, e.g., tea, rubber, and tobacco factories, copra-drying works, desiccated coconut and coconut oil factories; coir fibre works; cinnamon and citronella oil distilleries; rice mills.

(2) A great variety of small local workshops of "handicraft" nature, including (in very approximate figures) 4,000 carpenters' shops, 3,000 gold and silversmiths, 2,000 blacksmiths, 2,000 potteries, 900 brick and tile kilns, and 500 lime kilns.

(3) Other miscellaneous establishments such as electric power stations, engineering works and repair shops, soap factories, food factories.

Details of the numbers employed and the output of these establishments are not available.

The Ministry of Labour, Industry and Commerce, has in view the intensive development of local industries so as at least to ensure that the country is provided with less intricate types of manufactured goods, particularly those which can be turned out of local raw material. As a step in this new policy, the appointment of an Industrial Adviser is contemplated.

VII.—Other Economic Activities.

Ceylon lies on one of the principal routes of sea-communication of the world. The importance of Colombo as a port of call is revealed by the following figures of passenger traffic during the last five years:—

			<i>Embarked.</i>	<i>Disembarked.</i>	<i>In Transit.</i>	<i>Total.</i>
1929	...	...	73,110	77,008	150,375	300,493
1930	...	...	68,295	67,526	140,935	276,756
1931	...	...	58,448	62,862	136,428	257,738
1932	...	...	46,024	49,305	139,438	234,767
1933	...	...	50,414	59,793	152,881	263,088

Re-exports of imported goods are negligible, representing about 2 per cent. of the total exports.

While there is some tourist traffic it is of negligible importance in the economic life of the Island.

VIII.—Communications.

Ceylon is well provided with internal communications.

There are over 16,500 miles of roads and cart tracks in the Island and 8,200 miles of bridle paths in addition.

The main roads are in the charge of the Public Works Department, the surfaces being as follows:—

							<i>Miles.</i>
Full-metalled	...	...	...	...	...	...	3,754
Track-metalled	...	...	...	...	...	...	504
Gravelled	...	...	...	...	...	...	417
Natural	...	...	...	...	...	...	128
							4,803

The streets (565 miles), minor roads (3,000 miles), and natural cart-tracks (7,800 miles) are in the charge of the appropriate local authorities. Some 350 miles are privately owned.

The metalled roads, with few exceptions, may be regarded as fit for all classes of traffic. By the end of 1933 some 3,440 miles of these roads had been tarred or otherwise surface-treated. Gravelled roads can be regarded as dry-weather roads only.

The following motor vehicles were on the registers of Ceylon on the 31st of December, 1933:—

Motor cars and cabs	...	...	...	...	...	...	15,046
Omnibuses	...	...	...	...	...	...	2,080
Lorries, Vans, etc.	...	...	...	...	...	...	2,898
Tractors	...	...	...	...	...	...	28
Trailers	...	...	...	...	...	...	147
Motor Cycles	...	...	...	...	...	...	3,160
							23,359

This figure shows an increase of 156 compared with the number on the registers on the 31st of December, 1932, viz., 23,203.

Besides the motor-lorry the principal form of road transport is the bullock-cart, the total number of single and double bullock-carts in the Island being about 34,000.

The cost of transport by motor-lorry is not much more than half of that by bullock-cart per ton mile, and the lorry is therefore gradually displacing the older vehicle.

The Ceylon Government Railways connect Colombo with all the most productive parts of the Island and also provide a link with the Indian railways via the ferry at Adam's Bridge. There are night mails in both directions every night by this route.

The total length of line open is 951 miles, of which 834 miles are broad gauge (5 feet 6 inches) and 117 miles narrow gauge (2 feet 6 inches).

Colombo is an important port of call on the main shipping lines from Europe to the East and there are frequent opportunities of direct sea communication with the United Kingdom, the principal Continental ports, India, Australia, China, and Japan and less frequent opportunities of direct communication with South Africa and the United States.

The total number of vessels entered at Ceylon ports in 1933, excluding steamers calling only for bunkering, warships, transports and coastwise vessels was as follows:—

	British.		Foreign.		Total.	
	Vessels.	Tons.	Vessels.	Tons.	Vessels.	Tons.
Steamships ...	1,837	6,597,083	973	4,781,113	2,810	11,378,196
Sailing Vessels ...	662	59,658	—	—	662	59,658

Of these vessels 2,307 steam vessels and 181 sailing vessels entered at Colombo. The other ports of entry for steam vessels were in order of importance, Galle, Trincomalee, Talaimannar, Jaffna, Kankasanturai, Kayts, and Point Pedro. There were nine other ports of entry for sailing vessels.

All types of vessels navigating Eastern waters call at Colombo, which has an artificial harbour constructed out of an open anchorage by the building of extensive breakwaters, which enclose over one square mile of water.

Berthing accommodation, exclusive of Graving Dock, Guide Pier and Oil Jetties, is available for 35 vessels in the north-east monsoon, and 23 or, using packed berths, 39 vessels in the south-west monsoon. Berths are available in either monsoon for vessels drawing up to 33 feet, and one of these berths could accommodate vessels without any limit as to length.

The port has excellent facilities for docking and for bunkering both oil and coal. The rapid discharge and loading of cargo is a special feature. There is a large graving dock 700 feet in length and a patent slip capable of slipping a vessel of 1,200 tons dead weight.

The port is equipped with an up-to-date oil fuel installation which provides for the rapid bunkering of ships using oil fuel. The main Oil Installation Depot, about 92 acres in extent, is situated at Kolonnawa, about 3½ miles from the harbour front, and various oil companies have erected their own storage and distribution tanks there. This depot is divided into a non-dangerous and a dangerous oil section and is separated by a safety reservation. Three main pipelines are laid connecting the discharge berth in the harbour with the main oil depot, two for oil fuel and the other for kerosene and petrol. In connexion with the bunkering of vessels, a measuring tanks depot, about 19 acres in extent, has been established at Bloemendahl, about three-quarters of a mile from the harbour front, and branch pipelines are provided from Bloemendahl to the bunkering berths. The oil depot is also connected to the main railway system of the Island. Three reinforced concrete jetties, two for bunkering purposes and one for discharge of oil tankers, have been provided. The outer oil bunkering jetty is capable of accommodating vessels of 500 feet length and 27 feet draught. The inner bunkering jetty is used by barges for bunkering. Vessels of 500 feet length and 27 feet draught can be berthed at the discharge jetty and vessels of draughts up to 29 feet can be berthed at the Graving Dock Guide Pier where the latest facilities for discharging oil ships are provided.

About a quarter of a mile south and west of the harbour is an expanse of water known as the Beira Lake. It communicates with the harbour by means of a canal which is navigable by 40 ton barges and small tugs, etc. This canal, together with the lock basin and locks and the water area of the Beira Lake including the locks of a further canal leading into the Lake known as the San Sebastian Canal is now included in the limits of the port of Colombo. A portion of land bordering on the Beira Lake has been opened up for commercial purposes. There is every indication that when trade improves, there will be increasing demand for land on the lakeside which by its propinquity to the harbour and easy access thereto both by land and water affords a valuable venue for commercial purposes. The progressive development of the Beira Lake should gradually ensure the establishment of a commercial zone in the vicinity of the port serving as a feeder to the business of the port and fostering its development.

Landing and shipping of cargo is assisted by an efficient crane service. The largest lift which can be made is 35 tons. The conveyance of cargo from the vessel to the wharf is done by lighter, and is carried out by recognized stevedores and landing companies. There is a total quayside of 15,657 lineal feet for lighter traffic.

Proposals for the development of the harbour, including the deepening of it and the provision of deep-water quayside and an oil basin have been under consideration for some years and provision has been made in the Estimates for 1934-35 for the necessary preliminary work in the preparation of plans and estimates. The harbour is under the control of the Colombo Port Commission, which is composed of six official members, excluding the Chairman or Chief Port Commissioner, six unofficial members representing Import, Export, Shipping, Coaling, Oil, and Landing Agencies interests, and two unofficial members nominated by His Excellency the Governor to represent Ceylonese interests.

IX.—Tariff.

Customs duties are imposed on all imports with certain exceptions, generally at *ad valorem* rates up to 25 per cent. general and 15 per cent. preferential, where a preferential rate is provided for, but with a number of specific duties, e.g., alcoholic liquors, tobacco, rice, fish, and other foodstuffs.

A limited system of Imperial Preference was introduced in February, 1933. Preferences were then granted on a number of items of interest to the United Kingdom, including motor vehicles, machinery, and certain iron and steel goods, boots and shoes, chemicals, paper, soap, and certain textile products.

The general rate of preference is 10 per cent. *ad valorem* but there are exceptions. All preferences are Empire wide.

X.—Trade Representatives.

As a step in the new policy of promoting overseas trade three temporary Trade Representatives were appointed recently to visit (1) India, (2) Italy, Greece, Turkey, Palestine, Syria and Egypt, (3) Honolulu and the United States of America to explore the possibilities of developing Ceylon's export trade in these regions. Valuable material has been collected by the Representatives, as a result of which it has been possible to ascertain more clearly the particular requirements of the respective areas visited. A considerable number of inquiries for Ceylon produce were received by the Bureau of Industry and Commerce from the above countries and trade connexions were established with Ceylon exporters. At present there is an Honorary Trade Representative in London but it is proposed to establish at an early date a Ceylon House in London under the charge of a permanent Trade Representative.

The Ceylon Association in London is the London representative of the United Kingdom companies owning property in Ceylon and also represents the interests of certain of the locally registered companies.

As Imperial Trade Correspondent, the Principal Collector of Customs, is under the Senior Trade Commissioner in India and Ceylon.

HONG KONG.**I.—Situation, etc.**

The Colony of Hong Kong consists of Hong Kong Island, the Kowloon Peninsula, one large and a few small islands, which are British possessions, and the New Territories which are held from China on a 99 years' lease running from June, 1898. The area of Hong Kong Island is 32 square miles and that of the whole Colony is about 391 square miles.

It is situated on the south-east coast of China, in latitude 22° N. and longitude 114° E. at the mouth of the river which goes up to Canton.

The climate is sub-tropical, the winter being normally cool and dry and the summer hot and humid. The south-west monsoon prevails in the summer and the north-east monsoon in the winter. The temperature rarely rises above 95° F. or falls below 40° F. The average annual rainfall is 85½ inches. In spring and summer the humidity is often very high. The typhoon season lasts normally from June to October, though typhoons occasionally occur before or after this period.

Of the total area of the Colony, viz., 249,885 acres, 50,203 acres are cultivated; the remainder, apart from the area occupied by towns and villages, is waste or uncultivated land, most of which is hilly.

All land in the ceded portions of the Colony is Crown land with the exception of the site of St. John's Cathedral, the freehold of which is vested by Ordinance in an incorporated body of Trustees, and certain land held in freehold by the Admiralty and War Department.

The Crown grants leases of Crown lands; the standard term was 999 years until 1898, but has since that date been 75 years renewable for one further term of 75 years at a reassessed Crown rent.

The New Territories are held by the Crown on a lease from China for 99 years from 1st July, 1898. In this district the standard term of lease granted by the Crown is 75 years from the above date renewable for 24 years less the last 3 days thereof at a reassessed Crown rent.

II.—Population, etc.

The great bulk of the population is Chinese by race; there is a domiciled European population, of whom the greater part are Portuguese by origin and are commonly known as "Portuguese," though they are and have been for two or three generations British subjects. There is also a substantial resident, but not domiciled, European population principally engaged in commerce.

In the census returns no distinction was made between those Chinese who were born in the Colony, and are therefore British subjects, and the remainder. Under Chinese law persons of Chinese race, even if born in Hong Kong, are Chinese subjects.

The estimated population on 31st December, 1933, was 922,643.

The following are the population figures of the census taken in March, 1931, partly by actual enumeration and partly by close estimating:—

Non-Chinese	...	...	...	...	...	...	...	19,369
Chinese in Victoria (Hong Kong Island)	...	...	...	...	...	...	...	358,351
Chinese in Hong Kong Island villages	...	...	...	...	...	...	...	41,156
Chinese in Kowloon and New Kowloon	...	...	...	...	...	...	...	255,095
Chinese in junks and sampans	...	...	...	...	...	...	...	68,721
Chinese in New Territories...	...	...	...	...	...	...	...	97,781
								840,473

To this figure must be added approximately 100,000 for the population of the fishing fleets and trading junks absent on the date of the census

There is continuous movement of population between the Colony and contiguous Chinese territory; this becomes more pronounced during periods of disturbance and civil war in the Canton area, when there is a large influx into the Colony, but there is a steady tendency for immigration into the Colony to exceed emigration owing to the continuous development of commerce and industry in the Colony and its superior attractions from the point of view of security of life and property. It is estimated that in 1933 about 2,511,000 persons entered the Colony and 2,455,000 left it.

III.—Finance.

A. CURRENCY AND BANKING.

1. The unit of currency in Hong Kong is the silver British dollar, commonly known as the Hong Kong dollar, divided into 100 cents. The silver content of this coin is almost identical with that of the Mexican dollar, which is still the currency unit of parts of China, and the various Chinese dollars derived therefrom, but from the point of view of international exchange the Hong Kong dollar is an independent currency unit, the exchange value of which should theoretically be identical with its value as silver bullion but in fact commonly varies from, and generally exceeds, that value by a margin which during some periods in the past has been very substantial.

The whole question of Hong Kong currency is one of considerable complexity, which is explained in detail in the Report of the Hong Kong Currency Commission, 1931.*

The legal tender currency of the Colony is the British dollar and Hong Kong subsidiary coin (50, 20, 10, and 5 cents silver, 1 cent copper), but the customary currency of the Colony comprises in addition to these the banknotes issued by the Hong Kong and Shanghai Banking Corporation, the Chartered Bank of India, Australia, and China and the Mercantile Bank of India. Owing to the fact that both coin and notes circulate in a wide area in China as well as in the Colony it is impossible to estimate accurately the actual amount of currency in circulation in the Colony.

It is estimated that the number of British dollars in circulation, i.e., from hand to hand including stocks in native banks but not including stocks in foreign banks amounts to \$4,000,000. The total number of British dollars held in the Bank note reserve was \$44,013,740 whilst in addition the reserve contains Mex. \$27,386,260, a total of \$71,400,000. It is impossible to give the amount of subsidiary coin issued and withdrawn as records are lost but the net amount out is recorded as \$18,114,370. Large quantities must have been destroyed, melted or lost as it is estimated that the amount now in circulation in Hong Kong is from 4 to 6 million dollars apart from stocks in the Hong Kong and Shanghai Banking Corporation. Bank notes in circulation at 31st December, 1933, were as under:—

	\$
Chartered Bank of India, Australia, and China	14,950,262
Hong Kong and Shanghai Banking Corporation	141,168,337
Mercantile Bank of India	1,465,119

The exchange value of the Hong Kong dollar is constantly fluctuating in terms of all other currencies, those fluctuations corresponding roughly but not accurately to the fluctuations in the value of silver in the foreign centres concerned. These fluctuations have been at times very pronounced, but during 1931 and 1932 the value of the dollar kept fairly close to one shilling at gold parity; that is to say that from January to September, 1931, the sterling value of the dollar was generally not far off a shilling and that since then it has varied with the value of sterling in terms of gold currencies. During 1933, the sterling value gradually increased from the opening rate of the year on 3rd January of 1s. 3d. to the closing rate of 1s. 5½d. on 29th December, 1933.

There was a further small but steady rise during 1934. The situation was greatly complicated late in that year by the silver-buying policy of the United States Government and the dollar rose in April, 1935, to 2s. 6d., the rate being subject to violent fluctuations.

2. Hong Kong, being one of the principal entrepôt ports through which trade with China is conducted, is a very important banking centre. Its banks include the Hong Kong and Shanghai Banking Corporation whose head office is in the Colony and which is, so far as the Colony is concerned, much the most important; branches of the two other note-issuing banks already mentioned; and branches of the Peninsular and Oriental Banking Corporation (head office in London), the Ho Hong Bank, Limited, (head office in Singapore), two Dutch, two French, two Japanese, two United States, and three Chinese "Western style" banks, as well as a number of "native banks," some of which command considerable resources. There is a local Clearing House of which the sixteen principal banks doing business in the Colony are members.

3. The Government conducts no banking business of any kind.

B. PUBLIC FINANCE.

1. Public Debt.

	Total amount of Public Debt on 31.12.33.	Rate of Interest.	Annual amount required for interest.	Sinking-fund.	Value of sinking fund on 31.12.33.
					£
Sterling issues	£1,485,732 16 5	3½%	£52,000 13 0	£14,857 6 8	911,748
Dollar issues	\$4,838,000	4%	\$193,520	\$166,911*	—

In July, 1934 (Ordinance No. 11 of 1934), an issue was made of \$14,000,000 in bonds to bearer at 99 per cent. bearing interest at 3½ per cent. There is no sinking fund. Redemption is by annual drawings of one-twenty-fifth of the total amount issued. Part of the proceeds was used to redeem the above sterling debt of £1,485,732 in October, 1934.

* Cmd. 3932.

* Invested in Sterling Stocks in 1934, £12,127

2. (a) *Revenue (on basis of Estimates for 1934).**Self-Balancing Departments.*

	<i>Revenue.</i> \$	<i>Expenditure.</i> \$	<i>Net Surplus.</i> \$
Post Office }	2,020,000	501,637	843,525
Wireless Services }		674,838	
Water Supply... ..	2,040,000	834,294	1,205,706
Kowloon-Canton Railway	1,581,000	1,142,781	438,219
	<u>\$5,641,000</u>	<u>\$3,153,550</u>	<u>\$2,487,450</u>

General Revenue.

	\$	<i>Percentage.</i>
(1) Surplus on self-balancing Departments	2,487,450	8.75
(2) Customs and Marine, i.e.—	\$	
Import Duties	4,565,000	
Harbour Dues	695,000	
	<u>5,260,000</u>	18.50
(3) Excise (Liquors)	1,100,000	3.75
(4) Opium Monopoly	1,300,000	4.50
(5) Assessed Taxes (Rates)	6,700,000	23.50
(6) Licences, Stamps, and other internal revenue	5,963,375	20.75
(7) Fees, etc.	2,226,250	7.75
(8) Rent and Interest and Miscellaneous	2,341,000	8.50
(9) Land Sales (premia on leases)	1,200,000	4.00
	<u>28,578,075</u>	<u>100</u>
Revenue of self-balancing Departments set off against Expenditure	3,153,550	
	<u>\$31,731,625</u>	

Equivalent (at \$1=1s. 6d.) to £2,379,872.

2. (b) *Analysis of Customs Revenue.*

The Revenue from Import Duties in 1933 amounted to \$4,687,734 and was derived from duties on alcoholic liquors, tobacco, and motor spirit as follows:—

	\$
Liquor	1,026,715
Tobacco	2,921,456
Perfumed spirits	86,896
Motor spirit	652,667
	<u>\$4,687,734</u>

It is not possible to give figures showing the duties for the different articles divided according to the countries from which they were imported.

3.—*Expenditure (on basis of Estimates for 1934).**Analysis of Expenditure.*

	\$	<i>Percentage.</i>
(1) Deficit on self-balancing Departments	—	—
(2) Debt Charges	1,439,308	—
(3) Administration	11,276,228	—
(4) Economic Development	2,627,189	—
(5) Social Services	7,709,155	—
(6) Defence	5,147,265	—
(7) Pensions	2,090,000	—
	<u>30,289,145</u>	<u>100</u>
Expenditure of self-balancing Departments set off against Revenue	3,153,550	
	<u>\$33,442,695</u>	

Equivalent (at \$1=1s. 6d.) to £2,508,202.

4.—*Reserve Funds, etc.*

The Hong Kong Government has no reserve or other special Funds but at the 31st December, 1933, the excess of assets over liabilities was \$13,823,625, held largely in the form of investments, cash, and bank deposits.

5.—*Grants-in-aid.*

Hong Kong has not received or requested any grants-in-aid from the Imperial Exchequer.

IV.—Trade Statistics.

Hong Kong is still relatively unimportant as a producing centre of primary products and manufactured articles, although manufacturing activity in the Colony is on the increase (see Section VI below). Its principal function is to act as the entrepôt port through which is conducted much of the trade of South China, not only with foreign countries, but also with other parts of China. The entrepôt trade of the Colony also includes a substantial trade between other Eastern countries, e.g., between Japan and the Malay Archipelago. Hong Kong uses the "invisible exports" represented by the profits which it makes in this entrepôt business and the associated financial and shipping services to purchase the commodities which it requires to meet the needs of its population. On balance therefore its visible imports usually greatly exceed its exports. In 1933 owing to large exports of bullion and specie exports nearly equalled imports.

The collection of trade statistics, which was not commenced until 1917 was discontinued in July, 1925, and not resumed until the 1st of April, 1930.

(i) *Total exports of merchandise to—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	\$	\$	\$	\$
1931	5,247,416	57,662,739	479,139,683	542,049,838
1932	3,462,248	42,607,973	425,789,485	471,859,706
1933	4,533,607	36,613,724	361,944,839	403,092,170
Equivalent at ls. 4½d. to \$ to	£306,963	£2,479,054	£24,506,682	£27,292,699

(ii) *Total imports of merchandise from—*

	\$	\$	\$	\$
1931	78,251,178	57,402,155	602,087,326	737,740,659
1932	76,905,373	56,752,665	490,389,562	624,047,600
1933	52,172,111	46,139,119	402,627,564	500,938,794
Equivalent to... ..	£3,532,487	£3,124,003	£27,261,241	£33,917,731

(iii) *Total exports of bullion, specie and currency notes to—*

	\$	\$	\$	\$
1931	616,925	2,626,718	118,530,237	121,773,880
1932	—	923,538	139,090,293	140,013,831
1933	65,329,240	4,033,787	64,769,557	134,132,584
Equivalent to... ..	£4,423,334	£273,121	£4,385,439	£9,081,894

(iv) *Total imports of bullion, specie and currency notes from—*

	\$	\$	\$	\$
1931	1,666,233	13,983,694	50,407,213	66,057,140
1932	13,414,751	105,459	71,752,193	85,272,403
1933	6,004	10,907	38,096,341	38,113,252
Equivalent to... ..	£407	£738	£2,579,440	£2,580,585

Trade Statistics for 1933.

<i>Article.</i>	<i>Value of total imports in \$</i>	<i>Principal countries of origin and value in \$'000.</i>	<i>Value of total exports in \$</i>	<i>Principal countries of destination and value in \$'000.</i>
Foodstuffs and Provisions.	166,926,361	Siam (46,053), French Indo-China (35,705), Netherlands East Indies (20,930), South China (13,856), North China (12,952), United States of America (6,040), Australia (5,216), India (4,883), Middle China (4,638), Japan (3,305), Canada (2,900), Holland (2,030), United Kingdom (1,544), Macao (1,478), Kwongchow Wan (1,164), Cuba (814), Malaya (746), Switzerland (652).	153,602,288	South China (79,238), North China (16,536), Macao (10,256), Middle China (9,418), Malaya (6,976), French Indo-China (6,527), United States of America (4,106), Philippine Islands (3,566), Kwongchow Wan (3,353), Siam (3,024), Netherlands East Indies (2,042), India (1,445), Canada (1,127), Japan (972), United Kingdom (915), Central America (895), Australia (692).
Piece-goods and Textiles ...	75,077,068	North China (35,499), United Kingdom (17,913), South China (7,917), Japan (7,003), Germany (1,966), Italy (1,519), India (971), Belgium (438), United States of America (331).	55,523,443	South China (20,337), French Indo-China (10,175), Siam (6,115), India (3,053), Malaya (2,796), Middle China (2,629), Macao (2,449), Kwongchow Wan (1,977), Philippine Islands (1,727), North China (990), Netherlands East Indies (836), United States of America (480).
Metals	38,060,566	South China (17,546), Belgium (6,669), United Kingdom (5,304), United States of America (1,938), Germany (1,684), Malaya (919), Holland (759), Middle China (607), North China (509), Italy (413), Japan (355).	33,650,441	United States of America (8,869), South China (7,975), Japan (4,005), France (2,957), North China (2,920), Middle China (2,500), Germany (1,338), Belgium (629), Macao (625), Italy (465), French Indo-China (332).

Trade Statistics for 1933—continued.

<i>Article.</i>	<i>Value of total imports in \$</i>	<i>Principal countries of origin and value in \$'000.</i>	<i>Value of total exports in \$</i>	<i>Principal countries of destination and value in \$'000.</i>
Oils and Fats ...	35,615,081	Netherlands East Indies (16,405), United States of America (9,350), South China (4,461), North China (3,666), Macao (454), United Kingdom (357), Malaya (233).	30,399,761	South China (12,656), Middle China (4,299), United States of America (2,335), North China (2,277), Kwongchow Wan (1,424), Japan (1,266), Macao (1,244), Malaya (1,138), United Kingdom (1,038), Siam (677), Germany (424), Holland (371), French Indo-China (250).
Chinese Medicines	17,894,502	North China (8,752), United States of America (2,320), South China (2,307), French Indo-China (1,262), India (941), Malaya (565), Japan (496), Siam (468), Middle China (259).	12,178,744	North China (2,177), Malaya (2,081), French Indo-China (1,493), South China (1,180), Netherlands East Indies (1,164), United States of America (1,011), Siam (607), Japan (485), India (374), Kwongchow Wan (367), Middle China (354), Macao (222).
Fuels ...	13,978,538	Japan (6,180), North China (2,375), India (1,894), South China (1,579), French Indo-China (885), South Africa (419), British North Borneo (283), Malaya (265).	2,124,689	South China (1,702), Macao (365).
Bags ...	13,879,253	India (11,574), Kwongchow Wan (1,021), South China (895), Middle China (197), Macao (104).	13,832,314	North China (9,151), Philippine Islands (1,629), Japan (1,206), French Indo-China (1,056), Netherlands East Indies (293), Siam (210).
Animals, live ...	11,404,142	South China (5,238), Kwongchow Wan (3,045), North China (1,587), Middle China (997), French Indo-China (450).	313,574	Macao (172), French Indo-China (140).
Manures ...	9,862,072	United Kingdom (4,510), Germany (3,968), Canada (721), North China (143), Malaya (138).	9,327,902	Middle China (5,546), South China (2,729), North China (343), Kwongchow Wan (268), Malaya (139).
Paper and paper-ware.	9,388,883	South China (1,577), United States of America (1,474), Japan (881), Norway (778), Middle China (773), Sweden (737), Germany (559), North China (554), Holland (517), United Kingdom (399), Italy (278), Canada (233).	8,023,326	South China (3,306), Middle China (1,060), French Indo-China (847), Malaya (784), Macao (617), Siam (384), North China (348), Netherlands East Indies (244).
Building Materials	9,355,085	British North Borneo (1,996), Siam (1,609), Japan (1,383), United States of America (798), United Kingdom (795), South China (627), French Indo-China (477), Belgium (441), North China (276), Canada (223).	4,766,764	South China (3,173), Macao (416), North China (396), Malaya (344), Middle China (217).
Chemicals and Drugs.	6,687,699	Germany (2,036), United Kingdom (1,484), United States of America (893), Japan (449), North China (437), France (398), Belgium (255).	3,849,444	South China (1,779), Middle China (579), North China (554), Macao (340), French Indo-China (204).
Tobacco ...	6,538,857	North China (2,076), United Kingdom (1,848), United States of America (1,256), Macao (702), South China (411).	5,184,668	Malaya (1,126), South China (729), Macao (699), Netherlands East Indies (466), Belgium (413), French Indo-China (346), Siam (326), North China (287), South America (251).
Nuts and Seeds	5,814,214	North China (2,973), South China (1,046), Malaya (722), French Indo-China (300), Kwongchow Wan (216).	3,848,670	North China (884), South China (629), Malaya (437), Japan (426), Macao (348), French Indo-China (328), Siam (270).
Machinery and Engines.	5,644,200	United Kingdom (3,251), Germany (1,070), United States of America (651), North China (162), Japan (131).	1,952,188	South China (1,423), Middle China (169), Macao (146), North China (119).
Dyeing and Tanning Materials	4,388,962	Germany (1,945), French Indo-China (365), North China (357), Malaya (334), United States of America (305), South China (228), Holland (201).	3,855,838	South China (1,258), North China (981), French Indo-China (576), Middle China (517).

Trade Statistics for 1933—continued.

<i>Article.</i>	<i>Value of total imports in \$</i>	<i>Principal countries of origin and value in \$'000.</i>	<i>Value of total exports in \$</i>	<i>Principal countries of destination and value in \$'000.</i>
Vehicles ...	4,186,135	United Kingdom (2,449), United States of America (814), Canada (395), Japan (139), Germany (103).	2,058,274	South China (1,283), Middle China (173), Kwongchow Wan (156), North China (136), Macao (120).
Wearing Apparel	4,117,033	United Kingdom (1,361), Japan (606), Macao (518), Italy (455), United States of America (279), South China (229), North China (227).	8,487,648	Malaya (1,790), South China (879), Middle China (851), Philippine Islands (840), Siam (696), United Kingdom (498), Kwongchow Wan (493), Netherlands East Indies (469), Macao (405), India (255), North China (252), British West Indies (211).
Hardware ...	3,969,521	United Kingdom (1,143), Germany (1,033), United States of America (741), Japan (276), South China (263), North China (179).	2,436,656	South China (1,323), Siam (271), Middle China (241), Malaya (145).
Electrical Apparatus	3,769,654	United Kingdom (1,165), United States of America (820), Germany (525), Japan (416), North China (352), Macao (205).	3,539,472	Netherlands East Indies (910), South China (774), India (439), Middle China (319), Siam (302), Malaya (203).
Liquor (Intoxicating).	3,768,994	United Kingdom (1,856), France (520), Macao (342), Netherlands East Indies (229), North China (197), Japan (167), Germany (154).	933,481	Macao (391), South China (130), North China (129).
Leather (all kinds).	2,967,079	French Indo-China (487), Australia (429), South China (407), United States of America (388), Germany (272), Malaya (263), Siam (192).	1,203,682	South China (416), North China (329), Macao (172), Japan (145).
Hides (all kinds)	2,142,362	Siam (758), French Indo-China (624), South China (592).	1,955,447	Japan (1,003), United States of America (335), France (290), United Kingdom (188).
Paints ...	2,002,257	United Kingdom (771), Germany (458), French Indo-China (248).	1,678,717	South China (555), North China (494), Middle China (186).

V.—Natural Resources.**A.****1.—AGRICULTURE.**

Compared with its population, the agricultural production of the Colony is negligible. The most important crop is padi, the area under which in 1933 was approximately as follows:—

	<i>Acres.</i>
2 crops of padi and 1 catch crop ...	11,514
2 crops of padi ...	22,110
1 crop of padi ...	2,649
	36,273

The remaining agricultural land was employed as follows:—

	<i>Acres.</i>
Sweet potatoes ...	8,694
Groundnuts ...	2,200
Sugar-cane ...	2,100
Orchard ...	559
Pineapples ...	377
	13,930

Almost the whole of this cultivated area is in the New Territories.

No statistics of the amounts produced are available, and in any case, apart from some of the rice which is considered to be of such superfine quality that it commands a high price in the export market, it seems improbable that any of these crops are grown for export.

2.—FOREST PRODUCTS.

Some areas of uncultivated and mountainous land are under timber, but it is of very inferior quality and not suitable for commercial exploitation.

3.—ANIMAL HUSBANDRY.

The Colony is not large enough for stock-raising in any quantity and there is no pasture land in the Colony, such land as would be suitable for this purpose being put to more profitable uses.

The total number of cattle in the Colony is a little over 2,000 this number including the milking herds of the dairy farms of which there are nine on Hong Kong Island and sixteen on the mainland. The only other "resident" live-stock are a few goats.

There is a very large importation of live-stock for slaughter in the two local slaughter-houses, the numbers slaughtered in 1933 being:—

68,071 cattle; 21,626 sheep and goats; 448,850 pigs.

In addition frozen beef and mutton was imported in cold storage to supplement the supplies derived from these sources.

There are lard factories adjacent to the slaughter-houses and large quantities of lard, sausages, dried meat, and cracklings are manufactured for export, chiefly to the Philippine Islands and the United Kingdom, as well as for domestic consumption.

With the exception of a few hundred hides tanned locally all the hides and skins are exported to Japan, the United States of America, France and the United Kingdom.

4.—MINERAL.

The Colony is not known to contain any mineral wealth except building stone and wolfram. There were some sixty quarries in existence in 1933 for the extraction of building stone, but many of them are very small; more than half are under an acre in area.

No records are available of the quantity or value of the stone extracted.

Practically no mining of the small wolfram deposits in the Colony took place in 1933.

5.—FISHERIES AND MARINE PRODUCTS.

Hong Kong is an important fishing centre and large quantities of fish are caught for local consumption and also to some extent for curing and exporting, particularly to adjacent parts of China, although on balance the Colony's imports of fish of various kinds exceed its exports.

Between 14,000 and 15,000 boats either actually employed as fishing boats or suitable for such employment frequented Hong Kong harbour in 1933.

No details are available of the classes, quantity, or value of the fish which was taken.

VI.—Industry.

Certain industries, notably ship-building, have long been established in the Colony and industry is steadily increasing in importance.

The following is a list of all the factories* and workshops* operating in the Colony at the end of 1933:—

Aerated waters	...	...	...	...	...	5
Batteries, dry	...	...	...	...	...	19
Biscuits and confectionery	...	...	...	...	...	19
Breweries	...	...	...	...	...	1
Brickworks	...	...	...	...	...	8
Bulbs, electric torch	...	...	...	...	...	2
Buttons, pearl	...	...	...	...	...	2
Cement tiles	...	...	...	...	...	7
Cement makers	...	...	...	...	...	1
Chemical works	...	...	...	...	...	2
Cigarettes, cigars, and prepared tobacco	...	...	...	...	...	15
Clock makers	...	...	...	...	...	1
Coal, briquettes	...	...	...	...	...	3
Concrete products	...	...	...	...	...	1
Distilleries (Chinese)	...	...	...	...	...	18
Dyeing	...	...	...	...	...	5
Electro plating	...	...	...	...	...	14
Engineering and shipbuilding	...	...	...	...	...	38
Feather cleaning and sorting	...	...	...	...	...	6
Fire crackers	...	...	...	...	...	2
Flour milling	...	...	...	...	...	9
Food preserving—ginger and fruit	...	...	...	...	...	15
" " —other foods	...	...	...	...	...	4
Furniture makers	...	...	...	...	...	3
Glass and mirrors	...	...	...	...	...	19
Gunny bags	...	...	...	...	...	1
Handkerchief makers	...	...	...	...	...	9
Hat makers (cork and felt)	...	...	...	...	...	9
Ice factories	...	...	...	...	...	3
Iron foundries	...	...	...	...	...	7
Joos stick makers	...	...	...	...	...	2
Knitting and hosiery	...	...	...	...	...	106
Lard factories	...	...	...	...	...	9
Laundry, power	...	...	...	...	...	2
Leather goods	...	...	...	...	...	11
Mat and grass rope	...	...	...	...	...	2
Medicine (Chinese)	...	...	...	...	...	3
Metal products (Miscellaneous)	...	...	...	...	...	11
Mosquito sticks and insect powder	...	...	...	...	...	4
Neon light makers	...	...	...	...	...	1
Noodles	...	...	...	...	...	4
Oil refineries	...	...	...	...	...	4

* "Factory" is defined in the Factories and Workshops Ordinance, 1932, as "any premises or place wherein or within the close or curtilage or precincts of which any machinery other than machinery worked entirely by hand is used in aid of any industrial undertaking carried on in such premises or place."

"Workshop" is defined as "any premises or place other than a factory wherein or within the close or curtilage or precincts of which any manual labour is exercised by way of trade or for purposes of gain in or incidental to making any article or part of any article, or altering, repairing, ornamenting, or finishing or adapting for sale any article provided that at least 20 persons are engaged in manual labour in the said premises or in the close, curtilage, and precincts thereof."

Ore refineries	6
Paints and varnishes	2
Paper (coloured)	1
Paper boxes (cardboard)	2
Pea-nut oil	6
Pencils, lead	1
Perfumeries and soap	17
Pianos	1
Printers and lithographers	38
Printing inks	2
Rattan ware	12
Records (gramophone) and radio	2
Rope makers	1
Rubber shoes	6
Saw mills	8
Shirt makers	5
Sugar refineries	1
Sugar boilers and candy makers	14
Thread factory, silk and cotton	1
Torches, electric... ..	13
Tin-can makers	5
Tin refineries	4
Tooth-pick makers	1
Vacuum flasks	3
Vermilion and white lead	7
Weaving	28
Total	<u>594</u>

No particulars regarding the quantity of goods produced are available. The approximate figures for the labour force employed are:

Males	22,500
Females	16,000
Total	<u>38,500</u>

The above are all over 16 years of age. The employment of any child under the age of 12 years in any industrial undertaking is forbidden by law, and women and young persons under the age of 18 years are not allowed to be employed in any industrial undertaking between the hours of 9 p.m. and 7 a.m.

Apart from the goods manufactured in these factories, certain manufactures, e.g., of wood, rattan, and sea-grass furniture and umbrellas are carried out under domestic and not factory conditions.

Certain of the factories mentioned above, e.g., the Taikoo sugar refinery, the Green Island cement works and the shipbuilding yards are of substantial importance, not only supplying the local market but also producing goods in substantial quantities for export; and exports of other local manufactures, e.g., rubber shoes are increasing.

The following figures relating to sugar give some indication of the extent of the overseas trade for 1933 :—

					Long tons	\$
Imports—						
Unrefined brown	...	...	...	...	99,648	9,850,064
„ white	...	...	...	...	89,654	10,424,126
					<u>189,302</u>	<u>\$20,274,190</u>
Less exports—						
Unrefined brown	...	...	...	...	30,233	3,097,462
„ white	...	...	...	...	64,086	7,654,917
					<u>94,319</u>	<u>\$10,752,379</u>
Retained imports (unrefined sugar)	...	...	...	...	<u>94,983</u>	<u>\$9,521,811</u>
Exports—						
Refined brown	...	...	...	...	10	1,150
„ white	...	...	...	...	57,601	8,791,419
Candy sugar	...	...	...	...	6,628	1,019,867
					<u>64,239</u>	<u>\$9,812,436</u>
Less imports—						
Refined brown	...	...	...	...	—	—
„ white	...	...	...	...	1,794	220,815
Candy sugar	...	...	...	...	28	4,020
					<u>1,822</u>	<u>\$224,835</u>
Net exports (refined sugar)	...	...	...	...	<u>62,417</u>	<u>\$9,587,601</u>

Although there is a large local production of cement a very considerable quantity is imported, the figures for 1933 being 127,773 tons to the value of \$1,578,668 imported and 55,904 tons to the value of \$1,467,085 exported.

The total number of vessels built in the Hong Kong ship-building yards in 1933 was 6 ocean-going and 28 smaller craft.

Of industries of secondary importance the following deserve mention:—

Ginger.—The business consists in preserving ginger imported fresh or salted. The figures for 1933 are as follows:—

<i>Ginger fresh and salted—</i>						<i>Tons</i>	<i>\$</i>
Imports	...	...	...	...	...	5,007	741,386
Exports	...	...	...	...	...	333	44,813
Retained imports	...	...	...	...	...	4,674	\$696,573
<i>Exports—</i>							
Ginger preserved in casks	...	...	...	...	...		1,273,110
" " jars	...	...	...	...	...		93,768
" " dry in cases	...	...	...	...	...		473,178
							\$1,840,056

Imports under these three headings are negligible.

Knitting factories.—These specialise chiefly in the manufacture of cotton singlets and silk and cotton hosiery.

Imports of raw material in 1933 were as follows:—

<i>Cotton yarn—</i>						<i>lb.</i>	<i>\$</i>
(a) Up to single and double 40's	...	...	...	...	...	45,849,689	20,697,860
(b) Over 2/40's	...	...	...	...	...	1,622,834	2,449,659
(c) Not otherwise enumerated	...	...	...	...	...	1,171	2,159
						47,473,694	\$23,149,678
<i>Less exports—</i>							
(a) Up to single and double 40's	...	...	...	...	...	43,131,737	19,254,613
(b) Over 2/40's	...	...	...	...	...	583,003	961,077
(c) Not otherwise enumerated	...	...	...	...	...	60,456	60,277
						43,775,196	\$20,275,967
Retained imports	...	...	...	...	...	3,698,498	\$2,873,711
<i>Artificial silk yarn—</i>							
Imports	...	...	...	...	...	994,669	1,124,109
Exports	...	...	...	...	...	371,569	380,823
Retained imports	...	...	...	...	...	623,100	\$743,286
<i>Silk waste—</i>							
Imports	...	...	...	...	...		\$86,003

The principal classes of exports of knitted goods were as follows:—

<i>Hosiery (other than silk)—</i>						<i>\$</i>
Exports	...	...	...	...	...	908,761
Imports	...	...	...	...	...	399,356
Net exports	...	...	...	...	...	\$509,405
<i>Singlets—</i>						<i>\$</i>
Exports	...	...	...	...	...	3,631,244
Imports	...	...	...	...	...	683,877
Net exports	...	...	...	...	...	\$2,947,367

It is not possible to isolate the figures relating to silk hosiery.

Rope factories.—These cater principally for the local market, in which requirements are very considerable, but exports in 1933 exceeded imports by about \$210,000.

The manufacture of electric torches and batteries is of growing importance, and on account of this the number of electro-plating factories has increased. Furniture making of a high standard is now undertaken by three fairly large factories although there are still plenty of small concerns engaged in this trade. The manufacture of rubber boots and shoes and canvas boots and shoes with rubber soles is now carried on on such a scale, chiefly for export to Malaya and England, that the Colony must be regarded as a serious competitor in this field.

High tariffs in neighbouring countries, the ever-increasing manufacturing capacity of China herself and foreign competition were responsible for the recent closing down of several large factories and many smaller ones engaged in the manufacture of cotton goods and hosiery.

VII.—Other Economic Activities.

As already indicated a considerable part of the income of Hong Kong is derived from its "invisible exports," which may be classified as follows:—

- (i) Profits of entrepôt trade. See above (IV).
- (ii) Receipts from financial services. These include the financing of trade, the conduct of exchange operations, of which the Hong Kong dollar is the medium for much of South China, and the custody of funds deposited with Hong Kong banks by residents in China.
- (iii) Shipping services, including the earnings of vessels on the Hong Kong register and seamen resident in the Colony, and the repair and supply of vessels using Hong Kong harbour (see below, VIII).
- (iv) Receipts from the tourist traffic, which is of some importance although no estimate of its annual value is available.

VIII.—Communications.

The internal communications of the Colony are excellent. There are 161 miles of road on Hong Kong Island and 216 on the mainland, making a total of 377 miles, all suitable for motor traffic at all times of year; the commonest surface is water-bound macadam dressed with asphalt of which there are 227 miles. There is an excellent service of motor omnibuses, 56 operating on the Island and 118 on the mainland.

A tram-line runs from end to end of the harbour front of Hong Kong Island.

There is a cable tramway from the City to the Peak, the upper terminus being 1,300 feet above sea level.

The Island is connected with the mainland by a number of ferry services including one vehicular ferry which was opened in March, 1933; it is estimated that the two principal companies carried 34,253,000 passengers in 1933.

The Kowloon Canton Railway runs from the southern extremity of the Kowloon Peninsula through Kowloon and the New Territories. It is of 4 feet 8½ inch gauge. The British section from Kowloon to the frontier, 21½ miles, is owned and operated by the Colonial Government.

There is a daily service of two express trains each way between Kowloon and Canton, as well as a number of local trains on the British section.

The external sea communications of Hong Kong are excellent.

Regular passenger and freight services with Europe are maintained by the Peninsular and Oriental Steam Navigation Company, the Blue Funnel Line, the Messageries Maritimes, the Nippon Yusen Kaisha and several other British and foreign companies.

The Canadian Pacific Steamships, Limited, the Dollar Line, the Nippon Yusen Kaisha, and other lines maintain regular trans-Pacific services to Japanese, Canadian and United States ports.

Three companies, the Eastern and Australian, the Australian and Oriental, and the Nippon Yusen Kaisha maintain regular passenger and freight services to Australia.

There are also direct sailings to Africa, South America, and New York.

There is frequent and regular communication between Hong Kong and other Far Eastern ports in India, Java, the Philippine Islands, the Straits Settlements, Formosa, Indo-China, Japan, and the China coast.

There is local communication by river steamers with Canton, Macao, and West River ports with several sailings daily.

Besides all these services there is a vast traffic between Hong Kong and the adjacent provinces of China by junk and sampan.

The following table shows the total number and tonnage of foreign-going vessels of various kinds which entered the ports of the Colony in 1933:—

		<i>Vessels.</i>	<i>Net tons.</i>
<i>Steamers :—</i>	†		
British	...	2,408	6,010,308
Foreign	...	3,314	8,660,661
<i>River steamers :—</i>			
British	...	3,988	3,758,118
Foreign	...	989	394,691
Junks (foreign)	...	10,827	1,482,476
Steam launches (i.e., steamers under 60 tons) (foreign) ...	...	3,971	101,454
		25,497	20,407,708

Clearances were of approximately the same dimensions.

Entries of vessels trading within the waters of the Colony only are about the same in number as entries of vessels engaged in foreign trade but the net tonnage of those vessels is only between 4 and 5 per cent. of that of the foreign-going vessels.

The harbour of Hong Kong, which lies between the Island and the mainland, forms a natural anchorage for a great number of vessels. There are 56 Government-owned buoys in the harbour to which vessels can tie up and the wharf and godown companies have berthing accommodation on the mainland for eleven vessels up to 650 feet in length. The maximum depth of water alongside the wharves is 36 feet L.W.O.S.T.

Hong Kong has every form of necessary harbour equipment and provides all the services available in the most up-to-date ports in the world.

Three public Warehouse Companies have a storage capacity of 500,000 tons, 300,000 tons at Kowloon adjacent to the wharves, and 200,000 tons on the harbour front of the Island. In addition there are numerous Chinese-owned warehouses of small capacity in both Kowloon and Hong Kong.

Ample bunkering facilities are available, private stocks of coal on hand usually averaging 60,000 tons.

The average stock of fuel oil available for commercial bunkering is 55,000 tons.

There are two large Dock Companies with dry docks capable of taking vessels up to 750 feet on the blocks.

In addition there are five patent slipways capable of handling ships up to 325 feet and 3,000 tons displacement.

There are several smaller yards, mostly owned by Chinese, dealing with repairs to small craft and light work.

IX.—Tariff.

Hong Kong, by virtue of its entrepôt trade, is necessarily a free port, customs duties being levied only on alcoholic liquors, cigars, light oils, and motor vehicles. In the latter case the duty does not become payable until the vehicle is presented for registration. There are preferences in the duties payable for Empire-produced tobacco, cigarettes, cigars, and brandy. Motor vehicles of Empire origin are admitted free of duty. Motor vehicles of foreign origin pay a duty of 20 per cent. *ad valorem*.

X.—Trade Representatives.

There are no trade representatives of the Colony overseas. There are American and Canadian Trade Commissioners stationed in the Colony.

STRAITS SETTLEMENTS.

I.—Situation, etc.

The Straits Settlements comprise the four Settlements of Singapore, Penang, Malacca, and Labuan.

Singapore (220 square miles) is an island separated from the southern extremity of the Malay Peninsula by a narrow strait which is now traversed by a causeway carrying a road and railway. The principal town, Singapore, is on the south side of the island.

Included in the Singapore Settlement are:—

- (1) A few small islands in the immediate vicinity of Singapore Island.
- (2) *Christmas Island* (60 square miles) about 190 miles south of the western extremity of Java, containing extensive deposits of phosphate of lime.
- (3) The *Cocos or Keeling Islands* (one square mile) about 700 miles south-west of Batavia, consisting principally of coconut plantations.

Penang (110 square miles) is an island situated off the west coast of the Malay Peninsula at the northern extremity of the Straits of Malacca.

Included in the Penang Settlement are:—

- (1) *Province Wellesley* (280 square miles) a strip of country on the mainland opposite Penang Island.
- (2) The *Dindings* (180 square miles), comprising the island of Pangkor and a strip of country on the mainland about 80 miles south of Penang. By an agreement dated at Singapore, 6th June, 1934, the Dindings are to be ceded to Perak, in consideration for a payment of \$86,850. The agreement will come into force three months after the necessary legislation for the transaction has been passed by Parliament.

Malacca (640 square miles) is a strip of land on the west side of the Malay Peninsula about 110 miles from Singapore and 240 miles from Penang.

Labuan (40 square miles) is an island lying about 6 miles off the north-west coast of Borneo about 725 miles from Singapore.

The total area of the Colony is therefore about 1,531 square miles.

The history of land tenure in the Colony is a long and rather complicated one. When the Settlements were first granted to the European powers by the Malay Rulers presumably the whole territory was regarded as Crown land, but even then in the old towns like Malacca it may be assumed that some land was regarded as freehold. Since then the policy of the Government has varied from time to time and a number of forms of tenure exist. The earliest are in Malacca, where a number of title deeds in the Dutch language, dating from the Dutch period, are still valid. Other forms of tenure from the Crown are the Statutory Land Grant, which is a grant in perpetuity subject to a quit rent, and leases for 999 or 99 years or shorter periods, but this list is not exhaustive.

The greater part of the land of the Colony is now in private possession, under one or other of these forms of tenure. Apart from a few large estates, chiefly under rubber, the average size of the individual holding is very small. There are only 43 holdings of over 1,000 acres in the Colony and 551 of areas between 101 and 1,000 acres. Apart from holdings in Singapore Island, regarding which no figures are available, there are nearly 111,000 holdings of less than 10 acres.

The following table, which does not include the dependencies of Singapore, shows the distribution of land between private and public occupation at the end of 1933:—

	<i>Alienated Acres.</i>	<i>Unalienated Acres.</i>	<i>Total Acres.</i>
Singapore Island	127,170	13,630	140,800
Penang	49,178	21,222	70,400
Province Wellesley	175,591	3,609	179,200
Dindings	31,098	84,102	115,200
Malacca	316,535	93,065	409,600
Labuan	11,249	14,351	25,600

The Straits Settlements lie within the tropics very little north of the equator and there is little variation of temperature.

The highest monthly maximum at Singapore in 1933 was 93° F. in May, July, and August while the lowest was 76° in January. The highest monthly minimum was 80° in May and June, and the lowest was 68° in March. At Penang the highest monthly maximum was 95° F. in May and the lowest 78° in June. The highest monthly minimum was 78° in March, April, June and September, and the lowest was 70° in February, November and December.

There are no well marked dry and wet seasons, rain falling throughout the year.

The total rainfall for the year 1933 at Singapore was 82½ inches, January being the wettest month with 11 inches, and February the driest with 2 inches. The total number of rainy days was 200. The wettest year recorded was 1913 with 136 inches and the driest 1888 with 63½ inches.

The total rainfall at Penang for the year 1933 was 97 inches, the wettest month October (16 inches), the driest February (2½ inches) and the total number of rainy days 174.

Malacca, Province Wellesley, and the Dindings had approximately the same rainfall as Singapore and Penang Islands; that of Labuan being considerably higher, the totals in 1931, 1932 and 1933 being 138½, 155½ and 122 inches respectively.

II.—Population, etc.

At the census of April, 1931, the population was as follows:—

Singapore Settlement*	559,946
Penang Settlement	359,851
Malacca	186,711
Labuan	7,507

* including Christmas Island (1,059) and Cocos Islands (1,142).

making a total of 1,114,015 as against 883,769 in 1921. The racial distribution was as follows:—

Europeans... ..	10,003
Eurasians	11,292
Malays	250,924
Other Malaysians... ..	34,452
Chinese	663,458
Indians	132,277
Others	11,609
Total	1,114,015

The population of the Straits Settlements on 30th June, 1933, as estimated by the Department of Statistics was 1,040,710, the racial distribution being as follows:—

Malays and Other Malaysians	293,774
Chinese	607,984
Indians	106,562
Others	32,390
Total	1,040,710

The original population was Malay; all the remaining communities are the result of immigration, the Chinese and Indians in particular having come to the Colony in large numbers in the decade ending 1930 in search of work on the rubber, copra, and oil-palm plantations, and in tin mines.

Owing to the large excess of emigration since 1930 the population has decreased, although births exceeded deaths by 16,565 in 1932, and by 17,339 in 1933.

Statistics relating to immigration and emigration are collected and published for British Malaya as a whole; no separate statistics are kept for the Colony on the Malay States as there is no control of internal movements within the Peninsula.

For some years prior to 1930 inclusive immigration was in excess of emigration, usually by a wide margin. About this time trade depression in Malaya's principal industries, rubber and tin, was being experienced with the result that a large proportion of the immigrants had to return to their native country. In 1930 gross arrivals in British Malaya by land, sea, and air numbered 573,401 and departures 607,142, the net loss thus being 33,741. In 1931 the figures were arrivals 330,146, departures 517,675, net loss 187,529. In 1932, gross arrivals were 264,738 and departures 427,716 a net loss of 162,978. In 1933 gross arrivals were 250,126 and departures 288,575 being a net loss of 38,449 of which it is estimated that about 35 per cent affects the Colony. A revival in trade during the year 1933 checked the excess emigration and since the month of October there has been a surplus of immigration over emigration for the first time since July, 1930.

The following figures indicate the nature of the principal classes of employment as recorded in Census Report, 1931.

In Public Service	9,179
In industrial employment...	69,362
In agricultural, mining and manufacturing employment	134,107
Fishermen	12,432
Commerce	102,248
Professions	20,426
Personal Service	51,531
Transport	67,563
Others	647,167
Total	<u>1,114,015</u>

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the Straits dollar (equivalent at par to 2s. 4d.) divided into 100 cents. The silver dollar and half dollar are unlimited legal tender and the silver 20, 10, and 5 cent pieces, the nickel 5 cent piece and the copper 1 cent, $\frac{1}{2}$ cent, and $\frac{1}{4}$ cent pieces are limited legal tender.

In addition to the coinage currency notes, issued by the Government Currency Commissioners at Singapore, are unlimited legal tender.

The amount of currency nominally in circulation at the end of 1933 was \$66,964,286 in currency notes, \$3,370,834 in dollars and half dollars, \$9,383,113 in subsidiary silver coins and \$136,045 in notes of the Hong Kong and Shanghai Banking Corporation and the Chartered Bank of India, Australia, and China but there is no doubt that quantities of the silver dollars and half dollars have been melted down, particularly in the period immediately after the Great War when silver stood very high. The commercial banks ceased to issue notes a number of years ago, but their existing notes remain legal tender until withdrawn.

The exchange value of the dollar varies between the Commissioners' exchange selling rate of 2s. 3 $\frac{1}{2}$ d. and their purchasing rate of 2s. 4 $\frac{1}{4}$ d. Straits Settlements currency is the currency not only of the Straits Settlements but also of the Federated and Unfederated Malay States and Brunei, and is the basis of the currency of North Borneo and Sarawak.

2. There are altogether seventeen banks doing business in the Colony. The most important are the Chartered Bank of India, Australia, and China, the Hong Kong and Shanghai Banking Corporation (of which the head office is in Hong Kong), and the Mercantile Bank of India. There are two locally registered banks with their capital in Straits dollars the more important being the Oversea Chinese Banking Corporation, Ltd. There are three other British banks doing business in the Colony, three Japanese, two Dutch, one French, one United States, and two Chinese.

There are a number of Co-operative Societies in the Colony.

The statistics relating to Thrift and Loan Societies as at the 31st of December, 1933, are as follows:—

Singapore: Sixteen Societies, 5,774 members, paid-up share capital \$646,700.

Malacca: Four Societies, 1,115 members, paid-up share capital \$162,600.

Penang and Province Wellesley: Seven Societies, 3,081 members, paid-up share capital \$284,400.

Rural Credit Societies:—

Malacca: Eight Societies, 302 members, paid-up share capital \$8,100.

Penang and Province Wellesley: Six Societies, 128 members, paid-up share capital \$4,374.

Estate Labourers Co-operative Societies:—

Singapore: Four Societies, 1,638 members, paid-up share capital \$29,209.

Malacca: Ten Societies, 1,708 members, paid-up share capital \$13,109.

Penang and Province Wellesley: Twelve Societies, 1,586 members, paid-up share capital \$27,747.

Despite the universal depression, the Societies generally are expanding their activities and doing excellent work. Their accumulated capital amounts to \$1,176,230.

3. There is a Post Office Savings Bank in the Colony, the number of depositors on the 31st of December, 1933, being 33,055 and the aggregate amount of deposits \$6,843,085. The number of depositors increased during the year by 3,425 and deposits by nearly \$1,118,000.

The Government does not carry on any other form of banking business.

B.—PUBLIC FINANCE.

1. Public Debt.

The Straits Settlements have raised three loans, but only a very small part of the service of these loans is a charge on the finances of the Colony. Details of the indebtedness as at 31st December, 1933, are:—

(1) Straits Settlements 3 $\frac{1}{2}$ per cent. Inscribed Stock; £6,913,352 (equivalent to \$59,257,302). Nearly all this loan was re-lent to the Singapore and Penang Harbour Boards and the Municipal Commissioners of Singapore and Penang, which bodies are responsible for their shares of the interest and Sinking Fund. The estimated value of the Sinking Fund on the 31st of December, 1933, was about £2,109,489 (\$18,081,334).

(2) Straits Settlements and Federated Malay States Victory Loan, 1920; \$15,074,300 (£1,758,668). The principal and the major part of the interest on this loan are payable by His Majesty's Government in the United Kingdom.

(3) The Sterling Loan of 1921-22 amounting to £9,355,000 (\$80,185,714), of which £5,155,000 was issued at 6 per cent. and £4,200,000 at 4½ per cent. The whole of the proceeds were re-lent to the Federated Malay States Government, which is responsible for the interest and Sinking Fund.

All the above loans are trustee securities.

2. Revenue.

(a) *Analysis of Revenue (on the basis of Estimates for the year ending 31st December, 1934).*

Self-Balancing Department.

	Revenue.	Expenditure.	Net Surplus.
	\$	\$	\$
Post Office	1,970,100	1,762,759	207,341
<i>General Revenue (excluding receipts from Colonial Development Fund).</i>			
	\$	Percentage.	
I. Surplus on self-balancing department (see [a])	207,341	0·8	
II. Opium Revenue	6,300,000	23·1	
III. Tobacco Duties, Licences, etc....	3,543,500	13·3	
IV. Petroleum Duties	2,570,900	9·6	
V. Liquor Duties	2,421,420	9·1	
VI. Stamp Duties	1,558,330	5·8	
VII. Interest	5,673,386	21·1	
VIII. Rents of Government Property ...	1,838,229	6·9	
IX. Miscellaneous	2,631,947	9·9	
	<u>\$26,745,053*</u>	<u>100</u>	
Revenue of self-balancing Department set off against Expenditure	<u>\$1,762,759</u>		
Total	<u>\$28,507,812</u>		

* Equivalent to £3,120,256.

(b) *Analysis of Revenue from Import Duties.*

The revenue from Import Duties in 1933 amounted to \$9,012,291 derived from duties on alcoholic liquors, tobacco, and dutiable petroleum as follows:—

	\$	Percentage of Total Revenue.
Liquors	2,441,498	7·73
Tobacco	3,911,749	12·38
Petroleum	2,659,044	8·42
	<u>\$9,012,291</u>	<u>28·53</u>

3. Expenditure.

Analysis of Expenditure (on basis of Estimates for the year ending 31st December, 1934, excluding Colonial Development Fund expenditure).

	\$	Percentage.
I. Deficit on self-balancing department	—	—
II. Public Debt Charges	37,106	0·1
III. Administration	11,882,682	36·7
IV. Economic Development	4,405,550	13·7
V. Social Services	9,115,050	28·5
VI. Defence	4,333,301	13·4
VII. Pensions, etc.	2,454,695	7·6
	<u>\$32,228,384*</u>	<u>100</u>
Expenditure of self-balancing Department set off against Revenue	<u>1,762,759</u>	
Total	<u>\$33,991,143</u>	

* Equivalent to £3,759,978.

4. Reserve Funds, etc.

The only definitely allocated reserve fund is the Opium Revenue Replacement Reserve Fund (held against the contingency of its becoming possible effectively to suppress opium smoking) which at the 31st December, 1933, amounted to \$58,833,387.

In addition the Colony has a surplus of assets over liabilities which was \$67,646,289 at the 31st December, 1933, and was estimated at \$65,250,000 at the 31st of December, 1934. It is held partly in loans to other Malayan Governments, and local authorities in the Colony and partly in fixed deposits and liquid securities.

5. *Grants-in-aid.*

The Colony has received no grants or loans from His Majesty's Government except the following grants from the Colonial Development Fund:—

	£
(1) Colonial Veterinary Scholarship Scheme	50
(2) Grant to College of Medicine for Vitamin Research ...	600

IV.—Trade Statistics.

The unusual character of the trade of the Straits Settlements makes it necessary to depart from the usual form adopted for this section in other memoranda.

Malaya consists of seven separate political units:—the Straits Settlements, the Federated Malay States, and the five Unfederated Malay States, Johore, Kedah, Kelantan, Perlis and Trengganu.

These separate units conduct trade both with one another and with countries overseas, but the statistics relating to this trade are somewhat imperfect. The principal trade statistics of Malaya are the detailed statistics of trade between Malaya, viewed as a single unit, and foreign countries, but these statistics of course make no mention of trade within Malaya itself, nor do they distinguish between the domestic exports of Malaya and re-exports of foreign goods.

The Straits Settlements publish no statistics of their own trade, and the domestic exports of the Colony can therefore only be estimated; similarly the trade between the Straits Settlements and the other parts of Malaya can only be estimated from the published statistics of those other parts.

The Federated Malay States publish statistics of exports and re-exports, but the information regarding destination of exports is incomplete.

Johore, Kedah, Kelantan, and Trengganu publish statistics in much the same form as those of the Federated Malay States.

The table below contains an estimate of the total trade of Malaya in 1933. Where the figures are not stated in the footnotes to be conjectural they can be regarded as accurate.

MALAYAN TRADE, 1933.

Classes I–V.

	Imports		Domestic Exports		Re-exports		Total Exports		Total Trade		Total Trade
	From Overseas	From other parts of Malaya	To Overseas	To other parts of Malaya	To Overseas	To other parts of Malaya	To Overseas	To other parts of Malaya	Overseas	Local	
1	2	3	4	5	6	7	8	9	10	11	12
	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000
	(4+6)	(5+7)	(2+8)	(3+9)	(10+11)						
Straits Settlements £	38,577	13,583	12,546	100	27,934	8,027	40,480	8,127	79,057	21,710	100,767
\$	330,661	116,425	107,537	861	239,437	68,797	346,974	69,658	677,635	186,083	863,718
	(a)	(b)	(c)	(c)	(d)	(d)	(a)				
Federated Malay States £	3,438	4,394	5,532	7,062	37	422	5,569	7,484	9,007	11,878	20,885
\$	29,465	37,664	47,420	60,528	320	3,618	47,740	64,146	77,205	101,810	179,015
	(e)	(e)	(f)	(f)	(f)	(f)					
Unfederated Malay States £	263	4,041	1,384	4,773	—	416	1,384	5,189	1,647	9,230	10,877
\$	2,257	34,639	11,861	40,913	—	3,566	11,861	44,479	14,118	79,118	93,236
	(a)	(g)		(h)		(i)	(a)				
TOTAL £	42,278	22,018	19,462	11,935	27,971	8,865	47,433	20,800	89,711	42,818	
\$	362,383	188,728	166,818	102,302	239,757	75,981	406,575	178,283	768,958	367,011	
	£ 64,296		£ 31,397		£ 36,836		£ 68,233		£ 132,529		£ 132,529
	\$551,111		\$269,120		\$315,738		\$584,858		\$1,135,969		\$1,135,969

(a)=From Return of Foreign Trade of Malaya, by Statistics Department, for 1933 (I. and E. 1A).

(b)=This figure is based on the total exports from the Federated Malay States and the Unfederated Malay States to "other parts of Malaya," less the total exports known to have passed between the Federated and the Unfederated Malay States, plus 10 per cent. for freight and insurance.

(c)=Total calculated as shewn in text above: exact distribution estimated.

(d)=This figure is based on the imports into the Federated Malay States and the Unfederated Malay States from "other parts of Malaya" less the total imports known to have passed between the Federated and the Unfederated Malay States.

(e)=From Annual Report for 1933 of Federated Malay States Customs Department.

(f)=From Return of Federated Malay States Customs Department for 1st, 2nd, 3rd, and 4th Quarters, 1933.

(g)=Total imports as in Advisers' Annual Reports, less overseas.

(h)=Unknown but certainly very small.

(i)=Total exports as in Advisers' Reports, less (1) overseas and (2) imports into Federated Malay States from Unfederated Malay States as in Federated Malay States Customs Department Report, less 10 per cent. for insurance and freight.

The published trade statistics of British Malaya, which are analysed below, relate to the external trade of all parts of the Malay Peninsula and the insular Settlements, but not to the trade between those parts.

No endeavour is made in these statistics to distinguish between exports and re-exports, and, as much of the trade is of an entrepôt nature with foreign countries, it is impossible to distinguish with any certainty between exports of British Malaya proper and re-exports of imported produce, or between imports for domestic consumption and imports for re-export.

On the whole, however, the statistics indicate that the entrepôt business in "Straits produce", that is raw materials originating in the Malay Archipelago, is of considerably greater importance than the entrepôt business in manufactured articles.

The principal domestic exports of the Straits Settlements, in 1933 were, as regards articles classified as "produce", rubber, copra, betelnuts, rice, and phosphates, and, as regards articles classified as manufactured and semi-manufactured articles, rubber goods, smelted tin, coconut oil, canned pineapples, and miscellaneous articles including beer and aerated waters which are exported to neighbouring countries. Domestic exports of rubber amounted to 43,261 tons, which at the average value of rubber exported from Malaya during the year, namely \$213 a ton, may be valued at \$9,237,521 say £1,078,000.

Net exports of copra from Malaya in 1933 were 110,000 tons. Assuming that these domestic exports should be divided up among the various constituent parts of Malaya in the proportion of the area under mature coconuts, the Straits Settlements share of this would be 14,300 tons, which at the average value per ton of copra exported in 1933, namely \$71, might be valued at \$1,015,300 say £118,400. This figure is admittedly subject to a margin of error, but it does not seem possible to find any other basis of calculation. The domestic exports of copra from the Malay States do not help, since part of these is crushed in the Straits Settlements, and the domestic exports of the Federated Malay States (86,523 tons) and Johore (48,398 tons) by themselves exceed the total net exports of Malaya.

Other articles of produce are betelnuts, of which the Straits Settlements proportion of the Malayan net exports on the basis of relative acreage was valued at £42,400, and a small proportion of Malayan rice milled in Penang and exported overseas at £17,880.

As regards manufactured or semi-manufactured articles, net exports of coconut oil from Malaya in 1933 were 17,582 tons of which the Straits Settlements share, on the basis that this was manufactured in the Straits Settlements, is the net value taken at £244,000. Exports from the Federated Malay States to all destinations were 363 tons only, and none from the Unfederated States.

For practical purposes production of canned pineapples in Malaya is equivalent to exports. There are two working factories in Selangor in the Federated Malay States, six in Johore, and four in Singapore in the Straits Settlements. Total exports from Malaya in 1933 were valued at \$6,285,456. Domestic exports to all destinations from the Federated Malay States were valued at \$908,551, and from Johore at \$3,293,851. Assuming that these figures are calculated on the same basis as the final export figures, the remainder, namely, \$2,183,054, say £255,000, may be regarded as of Straits Settlements origin. This is also in proportion to the number of factories.

As regards rubber manufactures, the net export of rubber shoes in 1933 was \$1,721,479, say £200,839. The value of phosphates was £181,000, of smelted tin representing 53,713 tons (that is the Malayan export of 53,931 tons, all from Straits Settlements ports, less 218 tons smelted in the Federated Malay States) at £191 a ton was £10,308,000, and of miscellaneous manufactures including beer, aerated waters, etc., may be taken at say £100,000. The following table indicates how the tentative and provisional figure of \$107,537,000 or £12,545,803 is reached for the foreign domestic exports of the Straits Settlements in 1933, to which may be added \$861,000 or £100,000 for exports to other parts of Malaya. The following list shows the domestic exports of the Straits Settlements as above estimated.

Domestic Exports of Straits Settlements.

<i>Produce—</i>	<i>Foreign.</i> £	<i>Local.</i> £
1. Rubber (crude and sole crepe)...	1,078,000	
2. Copra ...	118,400	
3. Phosphates ...	181,000	
4. Betelnuts ...	42,400	
5. Rice ...	17,880	100,000
<i>Manufactured and Semi-Manufactured Goods—</i>		
6. Coconut Oil ...	244,284	
7. Canned Pineapples ...	255,000	
8. Manufactured Rubber Goods ...	200,839*	
9. Smelted Tin ...	10,308,000	
10. Miscellaneous (Beer, Aerated Waters, etc.) ...	100,000	861,000
	£12,545,803	961,000
	= \$107,537,000	\$8,237,000

* Plus value of exports by Singapore Rubber Works.

The smelted tin is in a class by itself, since all the ore is imported and the income earned by the Colony in smelting it is relatively inconsiderable. If this item is omitted as being only technically a "domestic export", it will be seen that the total value of the domestic exports of the Colony does not greatly exceed £2,200,000.

As regards the remaining parts of the Malay Peninsula the domestic exports of the Federated Malay States in 1933 were valued at \$107,948,459, those of Johore at \$34,287,483 and those of Trengganu at \$3,885,683. No figures of trade are available for Perlis, but the quantity is inconsiderable. For Kedah the only figures available are total exports for the Mohammedan year A.H. 1351 (May, 1932—April, 1933). Re-exports from Kedah are very small and the figure for gross exports, viz., \$10,559,618 or, say, \$10,560,000, might be accepted as an estimate of domestic exports for 1933, bearing in mind the facts that the Mohammedan year is 3 per cent. shorter than the Solar year.

For Kelantan only a figure for total exports for 1933, viz., \$3,454,098, is available. Re-exports are very small and \$3,400,000 might be accepted as an estimate of the value of domestic exports.

The total value of the domestic exports of Malaya in 1933 may therefore be tentatively estimated as follows:—

	\$	Equivalent to £.
Straits Settlement	115,774,000	13,506,803
Federated Malay States	107,948,459	12,593,987
Johore	34,287,483	4,000,206
Kedah	10,560,000	1,232,000
Kelantan	3,400,000	396,667
Trengganu	3,885,683	453,330
	<u>\$275,855,625</u>	<u>£32,182,993</u>

This figure might be rounded up to £32½ million including Perlis.

The total oversea exports of Malaya in 1933 were valued at \$404,630,590 (£47,206,902). It is very difficult to estimate what were the total gross exports of the seven territories, including exports from one territory to another for consumption in that territory, but it seems probable that an estimate of about £68 million would not be very wide of the mark. The re-export trade of Malaya may therefore be estimated at approximately £36 million.

EXPORTS.

(i) Total Exports to:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	\$	\$	\$	\$
1913	118,730,151	53,868,753	179,862,666	352,461,570
1930	85,633,239	110,638,762	474,942,404	677,160,523*
1931	64,792,610	54,839,714	310,196,117	434,672,133*
1932	58,424,840	60,392,859	247,412,938	369,527,174*
Equivalent to	£6,824,398	£7,045,834	£28,864,743	£43,111,504*
1933	55,261,409	50,605,667	295,923,915	404,630,590*
Equivalent to	£8,447,164	£5,903,995	£34,524,457	£47,206,902*

* Inclusive of Parcel Post, not shewn in preceding columns, as follows:—

	\$
1930	5,946,118
1931	4,843,692
1932	3,226,537
1933	2,839,599
Equivalent to	£331,286

(ii) Total Exports by Classes, 1933.

To	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	\$	\$	\$	\$	\$
United Kingdom	9,113,727	20,826,804	5,373,433	502	35,314,466
Australia	528,570	1,402,202	14,684,668	4,458	16,619,898
British India (including Burma)	6,499,446	2,042,995	4,840,568	8,120	13,391,129
Sarawak	2,859,335	202,839	2,434,081	380	5,496,635
Hong Kong	1,096,218	1,174,733	1,929,683	200	4,200,834
New Zealand	316,709	8,853	2,405,405	—	2,730,967
Rest of Empire	3,383,311	1,059,937	3,687,783	4,023	8,135,054
Total Empire	23,797,316	26,718,363	35,355,621	17,683	85,888,983
United States of America	602,512	72,758,091	51,903,979	2,947	125,267,529
Japan (including Korea and Formosa)	424,314	16,784,491	19,473,654	1,294	36,683,753
Netherlands East Indies:—					
Sumatra	8,532,785	968,355	8,987,544	6,318	18,495,002
Java	6,210,195	82,315	2,516,225	60	8,808,795
Borneo	2,086,944	47,042	1,664,543	—	3,798,529
Banka and Billiton	1,809,567	29,376	291,908	—	2,130,851
Other Dutch Islands	414,290	13,610	227,650	70	655,620
	<u>19,053,781</u>	<u>1,140,698</u>	<u>13,687,870</u>	<u>6,448</u>	<u>33,888,797</u>
France	725,029	11,390,427	5,582,776	310	17,698,542
Netherlands	383,851	4,509,960	11,522,207	660	16,416,678
Siam	2,070,822	549,457	11,874,776	21	14,495,076
Italy	71,144	5,461,254	5,803,930	827	11,337,155
Germany	892,263	7,907,037	538,988	4,483	9,342,771
Other foreign countries	3,560,485	10,612,909	8,230,468	911	22,404,773
Total foreign countries	27,784,201	131,114,324	128,618,648	17,901	287,535,074
GRAND TOTAL	51,581,517	157,832,687	163,974,269	35,584	373,424,057
Equivalent to	£6,017,844	£18,413,814	£19,130,331	£4,151	£43,566,140

In addition, there were exports of bullion and specie to the value of \$19,946,943 (£2,327,143) from the United Kingdom; \$31,150 (£3,634) from the rest of the Empire; and \$8,388,841 (£978,698) from foreign countries. Total \$28,366,934 equivalent to £3,309,476.

IMPORTS.

(i) Total Imports from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	\$	\$	\$	\$
1913	68,862,523	119,186,946	200,540,356	388,589,825
1930	98,075,565	130,611,889	487,428,941	724,555,477*
1931	62,485,389	71,966,960	323,164,940	462,477,140*
1932	55,724,421	68,106,822	256,546,493	384,488,075*
• Equivalent to	£6,501,182	£7,945,796	£29,930,424	£44,866,924*
1933	51,015,559	65,412,025	241,787,228	362,473,567*
Equivalent to	£5,951,815	£7,631,403	£28,208,510	£42,288,583*

* Inclusive of Parcel Post, not shewn in the preceding columns, as follows:—

	\$
1930	5,439,082
1931	4,859,851
1932	4,110,339
1933	4,258,755
Equivalent to	£496,855

(ii) Imports by Classes, 1933.

From	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	\$	\$	\$	\$	\$
United Kingdom ...	16,005,451	819,669	33,787,782	59,452	50,672,354
British India (including Burma)	15,959,322	4,446,847	10,564,918	781	30,971,868
Sarawak	1,749,590	3,426,778	7,978,757	5	13,155,130
Australia	7,106,388	186,499	520,685	100,438	7,914,010
Hong Kong	1,223,827	145,074	2,286,268	—	3,655,169
Union of South Africa	9,494	2,024,576	4,543	—	2,038,613
Rest of Empire ...	1,490,709	1,953,960	1,275,302	396	4,720,367
Total Empire ...	43,544,781	13,003,403	56,418,255	161,072	113,127,511
Netherlands East Indies:—					
Sumatra	5,871,628	15,934,466	41,046,485	4,385	62,856,964
Borneo	973,280	9,461,096	12,420,838	—	22,855,214
Java	8,858,233	2,240,519	4,838,401	14,314	15,951,467
Banks and Billiton ...	3,370,035	1,695,706	20,688	60	5,086,489
Other Dutch Islands ...	2,420,670	1,245,864	8,050	—	3,674,584
	21,493,846	30,577,651	58,334,462	18,759	110,424,718
Siam	29,437,147	18,832,431	413,549	2,363	48,685,490
Japan (including Korea and Formosa) ...	1,597,870	2,483,068	22,511,668	256	26,592,862
China	7,834,706	2,363,030	9,683,965	—	19,881,701
French Indo-China ...	3,461,749	2,274,133	85,731	—	5,821,613
United States of America	1,255,160	403,864	3,906,818	2,300	5,568,142
Germany	243,282	6,875	5,204,971	6,568	5,461,696
Netherlands	1,750,333	13,936	1,214,041	—	2,978,310
Other foreign countries	3,114,290	364,617	8,230,151	20	11,709,078
Total foreign countries	70,188,383	57,319,605	109,585,356	30,266	237,123,610
GRAND TOTAL ...	113,733,164	70,323,008	166,003,611	191,338	350,251,121
Equivalent to ...	£13,268,869	£8,204,351	£19,367,088	£22,323	£40,862,631

In addition there were imports of bullion and specie to the value of \$343,205 (£40,040) from the United Kingdom; \$2,956,868 (£344,968) from the rest of the Empire; and \$4,663,618 (£544,089) from foreign countries. Total \$7,963,691 equivalent to £929,097.

PRINCIPAL EXPORTS AND IMPORTS.

(i) Commodities in which Exports greatly exceed Imports, 1933.

Article.	Value of Total Imports	Principal Countries of Origin and Value in \$'000.	Value of Total Exports	Principal Countries of destination and value in \$'000.
Rubber—	\$		\$	
Dry (smoked sheet and crepe)	7,338,035	Sarawak (2,171), Sumatra (1,332), Dutch Borneo (919), North Borneo (724), Siam (698), Burma (492), French Indo-China (448), Java (285), Brunei (164).	119,294,844	United States of America (66,278), United Kingdom (15,020), Japan (10,381), France (9,515), Germany (4,658), Italy (4,413), Netherlands (1,830), Belgium (1,682), Australia (1,297), Czechoslovakia (1,017), China (741), Spain (641), Argentine Republic (450), Hong Kong (214), Mexico (177), Sweden (177), Ceylon (174), Union of South Africa (130).
Wet (sheet, scrap, lump, and bark)	13,714,501	Sumatra (6,786), Dutch Borneo (6,160), Siam (572).	—	—

(i) *Commodities in which Exports greatly exceed Imports, 1933.—continued.*

Article.	Value of total imports \$	Principal countries of origin and value in \$'000.	Value of total exports \$	Principal countries of destination and value in \$'000.
Rubber—continued.				
Latex	—	—	1,786,873	United States of America (1,118), United Kingdom (274), France (140), Germany (60), Italy (58).
Latex, concen- trated.	—	—	359,425	United States of America (207), United Kingdom (53).
Revertex	—	—	725,109	United States of America (214), United Kingdom (138), Netherlands (110), France (95), Japan (68), Italy (47), Spain (32).
Sole Crepe	473	—	273,432	United Kingdom (144).
	21,053,009		122,439,683	
Tin (blocks, ingots, bars, or slabs) ...	—	—	88,716,233	United States of America (51,403), Netherlands (11,486), Italy (5,774), France (5,530), United Kingdom (4,162), India and Burma (3,749), Japan (3,019), Belgium (1,600), Spain (537), Hong Kong (403), Germany (358), China (332).
Copra	5,890,453	Sumatra (3,246), Other Dutch Islands (991), Dutch Borneo (765), North Borneo (475), Banka and Billiton (162), Sarawak (141), Siam (96).	14,879,551	United Kingdom (3,480), Germany (2,628), Netherlands (2,297), Norway (1,198), France (1,198), United States of America (1,127), Sweden (964), Italy (855), Denmark (640), Egypt (193), Spain (158).
Pineapples, canned	66	—	6,285,456	United Kingdom (4,747), Canada (666), Netherlands (168), New Zealand (160), India and Burma (86), France (85), Germany (66), United States of America (62).
Iron Ore	838	—	3,546,544	Japan (3,546).

(ii) *Commodities of which there are Substantial Imports and Exports, 1933.*

	\$		\$	
Motor Spirit	39,726,226	Sumatra (29,950), Sarawak (4,338), Java (2,712), Dutch Borneo (1,550), Persia (1,176).	32,456,958	Japan (14,976), Australia (10,879), Sumatra (1,637), New Zealand (1,509), Other British Possessions (1,151), Siam (890), China (855), Dutch Borneo (290), Hong Kong (170).
Kerosene	11,500,380	Sumatra (6,210), Dutch Borneo (2,691), Sarawak (2,425), Persia (112).	7,758,682	Australia (3,107), Siam (2,180), Japan (799), New Zealand (701), Sumatra (368), Sarawak (220), Other British Possessions in Australasia (124), North Borneo (107).
Fish, dried and salted	6,485,958	French Indo-China (2,454), Siam (2,382), Japan (546), Sumatra (425), China (294), Sarawak (161).	7,365,734	Java (5,255), Sumatra (1,038), Burma (538), China (243), Dutch Borneo (111).
Pepper— Black	1,702,080	Sumatra (538), Banka and Billiton (442), Dutch Borneo (322), Sarawak (191), Java (126), Siam (82).	1,542,691	Hong Kong (278), Brazil (256), China (145), India and Burma (95), Other European countries (90), Spain (73), Argentine Republic (70), Germany (69), Egypt (54), Italy (48), Other British Possessions in Asia (42), United States of America (36), Other British Possessions in America (33), Peru (31), Union of South Africa (29).
White	4,007,694	Banka and Billiton (2,914), Sarawak (619), Dutch Borneo (467).	4,017,582	United Kingdom (2,469), Germany (514), Australia (205), United States of America (191), Argentine Republic (161), Hong Kong (73), China (69), Union of South Africa (60), New Zealand (44), India and Burma (42).
Long	33,574	Java (26).	28,366	India and Burma (23).
	5,743,348		5,588,639	
Gunnies	4,079,378	British India and Burma (4,066).	3,901,903	Siam (2,244), French Indo-China (1,137), Dutch Borneo (125), Sumatra (119), Java (88), Sarawak (77), Hong Kong (34).
Arecanuts... ..	2,539,105	Sumatra (1,696), Java (699), Siam (123).	4,350,118	India and Burma (3,724), French India (277), Siam (175), French Indo-China (99), Hong Kong (73).

(iii) *Commodities in which Imports greatly exceed Exports, 1933.*

<i>Article.</i>	<i>Value of Total Imports</i>	<i>Principal countries of origin and Value in \$'000.</i>	<i>Value of Total Exports</i>	<i>Principal countries of destination and value in \$'000.</i>
Rice—	\$		\$	
White	32,805,071	Siam (19,887), India and Burma (11,989), French Indo-China (802), China (94),	9,466,263	Sumatra (4,379), Banka and Billiton (1,457), Dutch Borneo (1,457), Sarawak (1,012), North Borneo (488), Zanzibar (319), Other Dutch Islands (125), Brunei (102).
Cargo	1,041,087	Siam (885), Burma (151).	27,028	—
	33,846,158		9,493,291	
Tin Ores and con- centrates	25,982,440	Siam (16,598), Burma (3,408), French Indo- China (1,635), Banka and Billiton (1,410), Union of South Africa (1,134), Japan (903), Sumatra (743), Other British Possessions in Africa (147).	5	—
Cotton Piece-goods				
Plain	5,125,039	Japan (2,410), United Kingdom (2,002), China (307), Netherlands (155), Russia (116), India (65).	1,263,328	Siam (621), Sumatra (319), Sarawak (102), Dutch Borneo (60), Mauritius (43).
Dyed in the Piece	5,773,516	Japan (2,685), United Kingdom (1,718), China (1,024), Hong Kong (152), India (118).	1,639,612	Sumatra (551), Siam (461), Dutch Borneo (179), Sarawak (175), North Borneo (154).
Printed	5,334,971	Japan (3,823), United Kingdom (1,144), Russia (210), China (77).	2,066,802	Sumatra (1,088), Siam (433), Sarawak (209), Dutch Borneo (95), French India (65).
Woven coloured cottons	142,150	United Kingdom (77), Japan (35), China (25).	11,978	—
	16,375,676		4,981,720	
Tobacco—				
Cigars	77,898	Philippine Islands and Sulu (45), Hong Kong (11).	6,767	—
Cigarettes	10,691,116	United Kingdom (9,797), Hong Kong (598), China (259).	1,256,477	Sarawak (372), Sumatra (348), Siam (238), North Borneo (144), Other Dutch Islands (63), Brunei (60).
Manufactured	196,220	United Kingdom (125), United States of America (49).	42,138	Sumatra (17), Sarawak (13).
Native Manu- factured	893,103	China (383), Siam (180), Sumatra (163), India and Burma (77), Hong Kong (60).	383,578	Sumatra (260), Sarawak (58).
Unmanufactured	679,555	United States of America (318), India and Burma (314).	56,653	Siam (39), Sumatra (17).
	12,537,892		1,745,613	
Liquid Fuel	10,195,911	Dutch Borneo (5,058), Sumatra (4,583), Sara- wak (554).	2,883,924	Siam (913), China (631), Egypt (540), Sumatra (365), Dutch Borneo (247).
Sugar, coarse and refined	6,162,111	Java (4,960), United Kingdom (814), Hong Kong (371).	820,768	Siam (228), Sarawak (196), Sumatra (102) North Borneo (68), French Indo-China (67), Brunei (41).
Milk—				
Condensed, sweetened	5,497,436	Australia (1,828), United Kingdom (1,318), Netherlands (1,164), Denmark (371), Switzerland (332), Japan (182), New Zealand (150), Italy (55), Irish Free State (49).	918,154	Sumatra (250), Siam (190), Sarawak (157), Dutch Borneo (70), North Borneo (67), Banka and Billiton (61), Celebes and Moluccos (40), Java (34).
Condensed, unsweetened	59,554	United Kingdom (47).	4,869	—
	5,556,990		923,023	

(iii) *Commodities in which Imports greatly exceed Exports, 1933.—continued.*

Article.	Value of total Imports \$	Principal countries of origin and Value in \$'000.	Value of total Exports \$	Principal countries of destination and value in \$'000.
Cotton Sarongs, slendangs, and kains	5,267,475	Japan (2,089), India (1,232), Java (1,107), French India (755).	1,561,158	Sumatra (724), Siam (392), Java (198), Sarawak (96), Philippine Islands and Sulu (57).
Coal	4,299,742	Japan (1,556), Union of South Africa (890), Sumatra (658), United Kingdom (550), Dutch Borneo (196), China (157), Australia (131), French Indo-China (95), India (66).	27,285	Siam (18).

V.—Natural Resources, etc.

A.

1.—AGRICULTURE.

The natural resources of the Colony are predominantly agricultural. Certain kinds of agriculture are carried on both by Europeans on the plantation system and also by Asiatics, not only on the plantation system but also on less organized lines.

Rubber is the most important product, and, with the exception of a comparatively small quantity absorbed by manufacturers in Singapore, is all exported overseas.

The area under rubber at the end of 1933 was approximately 340,846 acres, over one-third of the total area of the Colony, of which 46,260 acres, excluding Labuan on estates of 100 acres and over were not being tapped. The area not being tapped on smaller estates cannot be stated, but was probably comparatively large. The area was divided among the various Settlements as follows:—

	Acres.
Singapore	43,134
Penang	12,839
Province Wellesley	64,894
Dindings	15,395
Malacca	201,804
Labuan	2,780
	340,846

Of the total area, 62.61 per cent. consisted of estates of over 100 acres, and 37.39 per cent. of estates of under 100 acres in extent, the latter being owned almost entirely by Asiatics.

The area planted with bud-grafted rubber amounted to 4,572 acres, of which 1,039 acres are tappable.

The total domestic production of the Colony in 1933 was estimated to be 56,562 tons as compared with 49,862 tons in 1932. This amount is about one-tenth of the total exports from British Malayan ports, or about one-eighth of the domestic exports. With the exception of a small quantity absorbed by a Singapore manufacturer the whole is exported.

The rise in price of rubber during 1933 had the effect of bringing into tapping large areas upon which tapping had ceased at the end of the year. The proportion of tappable rubber not tapped amounted to 23.9 per cent. of the total tappable area as compared with 29.8 per cent. at the end of 1932.

Coconuts are the second most important plantation crop. The area under coconuts in 1933 was estimated at 96,351 acres. In Penang and Province Wellesley many of the palms are of great age, and the annual mortality is consequently high, but partly counter-balanced by replantings.

Coconuts, in the form of fresh nuts and coconut oil, are consumed locally, and some fresh nuts are also exported from Penang mainly to Burma, but the main purpose of coconut cultivation is for the production of copra for export.

It is very difficult to form even a rough estimate of the total production of nuts. Many dwellings have small groups of palms planted near them, their produce being used entirely for local consumption, as are also the nuts from many of the holdings under five acres in area. Of the copra produced, which generally falls into the two classes of "Sun-dried" and "Fair Merchantable" (the value of the former exceeding that of the latter by about 13 per cent.) the greater part is exported, but an increasing quantity is used by the oil mills of Singapore and Penang, which also use copra produced in neighbouring foreign territories.

Much of the copra prepared in the Federated and Unfederated Malay States and also in some of the Netherlands Indies is exported through the ports of the Colony after re-drying and grading.

Continued attention has been devoted to the improvement of the quality of estate copra and a number of estates have erected kilns in which modifications have been introduced in accordance with the recommendations of the Department of Agriculture.

Coffee is at present a crop of minor importance, the area under it being estimated at 608 acres in Malacca, 821 acres in the Dindings, including 300 acres interplanted with rubber on a European estate, and about 85 acres on Singapore Island, a total of about 1,525 acres for the whole Colony. The figures of actual production are unknown. The whole of the output is consumed locally and there are in addition substantial imports of coffee from Java and Sumatra.

Of the crops grown exclusively by Asiatics the most important are rice and pineapples.

Rice.—The total area plantable with wet padi varies slightly from year to year owing to the fluctuations of other crops, but usually only a small part of the available land is left unplanted.

The following table shews the plantable and planted areas together with the yields for the past four seasons.

Season	Area		Yield	
	Plantable	Planted	Unhusked	Milled
	acres	acres	Padi Tons	Rice Tons
1929-30	—	67,005	40,973	24,584
1930-31	72,140	67,350	62,640	37,584
1931-32	71,380	67,980	62,834	37,700
1932-33	72,359	70,530	57,166	34,300

The crop is subject to severe damage from drought, insect pests, rats, and, in certain areas, high tides, and there are therefore wide fluctuations of total yield.

On balance British Malaya is a large importer of rice, the total output being even in the most favourable circumstances quite insufficient for local requirements. However, the amounts imported during the last three years have steadily decreased largely owing to the development of rice cultivation throughout Malaya. It is not the custom in Malaya to plant more than one crop of padi in a year.

Palm Oil is an industry of growing importance to Malaya as a whole but plantations at present are confined to the Malay States. There is a bulking plant, recently installed in the premises of the Singapore Harbour Board. Exports from Malaya in 1932 amounted to 7,905 tons valued at \$1,139,405. In 1933 exports had increased to 12,381 tons valued at \$1,399,130.

Pineapples.—While pineapples are grown to some extent for sale fresh, the great bulk of the crop is grown for canning purposes. The area under pineapples in Singapore Island is about 10,000 acres, but, in addition to the pineapples grown thereon, large quantities of fresh fruit are imported from Johore.

The area under pineapples in the other Settlements is about 1,500 acres in all.

The total exports from Malaya of tinned pineapples for the past five years are shewn in the following table.

Year	Quantity in tons	Value in \$
1929	58,690	9,233,886
1930	57,960	7,859,048
1931	59,459	7,083,450
1932	66,292	7,914,687
1933	59,581	6,285,456

At the end of 1933 there were five factories in Singapore and twelve factories in Johore of which four had not operated during the year.

Considerable attention is now being given by certain growers to the question of manuring on a commercial scale and to the finding of a suitable rotational crop. With the gradual conversion of the industry from a catch crop to a main crop basis, manuring becomes a matter of great importance if a suitable rotational crop is not found.

A good deal of work is being done both with regard to grading and improvement of quality and also on experimental cultivation of the plant.

Fruit.—The area planted with fruit trees is as follows:—

	Acres.
Singapore	2,060
Penang	3,358
Province Wellesley	133
Dindings	65
Malacca	1,376
Labuan	2,045
	9,037

No information regarding total production is available and exports are unimportant. Probably the most important fruit produced is the banana. There is a tendency to increase the orchard area in Singapore Island, but supplies are obtained in the main from foreign sources.

Vegetables.—Vegetable cultivation is almost entirely in the hands of Chinese market gardeners, who often combine it with pig and poultry breeding and sometimes carp rearing. The industry provides a livelihood for a considerable part of the rural population of Singapore Island and supplies the town markets with the greater part of their requirements of such vegetables as can readily be grown in the plains of Malaya, but there is a considerable importation of other vegetables from foreign countries.

Other crops.—**Tobacco.**—Tobacco is a crop of growing importance in the Colony. At the end of 1933 about 181 acres were planted with tobacco in the Colony mostly by Chinese market gardeners. The year's crop is unknown.

The crop is mostly sold for the manufacture of local cheroots, and Chinese-owned factories for the preparation of cigarettes and manufactured tobacco exist in Province Wellesley and Singapore.

Spices.—The principal spices are cloves, nutmegs and mace.

The area under cloves and nutmegs in the Colony is very small, 392 acres in Penang and 58 in Province Wellesley. 394 acres are planted with chillies, principally in Singapore Island (350 acres). Sireh is cultivated on 160 acres in the Colony and 56 acres are devoted to pepper and ginger.

Other crops grown on some scale by Asiatics, mostly for local consumption are *arecanuts* (about 1,387 acres), *tapioca* (about 1,137 acres), and *sago* (about 144 acres); and in certain localities the drying and plaiting of the leaves of the *nipah palm* for roofing material is a local industry of some importance.

2. FORESTRY.

As a result of pressure of population the forests of Singapore Island have been depleted to an extent that led to the closing down of the forest organization in 1932 when the revocation of all but one of the reserves was under consideration. It has been decided, however, to re-establish the organization chiefly for the purpose of fostering and encouraging the saw-mill industry, and since this will necessitate the services of a resident trained forest officer the revocation of the reserves will not be proceeded with until their possibilities have been further explored.

The remaining Settlements are fairly well provided with forests, in respect of which a conservative policy is followed.

Malacca has a considerable forest area, chiefly of the plains type, while the forests of Penang, Province Wellesley, and the Dindings are mainly hilly, but contain fair quantities of superior hardwoods and constitute a useful source of local supply. A scheme of converting all these forests into regularly managed stands is in hand.

The forest reserves of the Colony at present occupy 181 square miles, nearly one-eighth of the total area of the Colony, distributed as follows:—

							Acres.
Singapore	...	...	...	...	...	...	16,242
Penang and Province Wellesley	...	...	...	...	...	...	15,745
Dindings	...	...	...	...	...	...	33,575
Malacca	...	...	...	...	...	...	50,518
							116,080

There is no prospect of their further extension, and if the Singapore forest reserves are relinquished the total area will fall to 99,838 acres.

The out-turn of the principal forest products was as follows:—

			Timber c. feet.	Firewood c. feet.	Charcoal c. feet.
1930	...	...	489,230	2,763,179	33,355
1931	...	...	366,637	1,466,451	27,595
1932	...	...	264,313	1,004,856	59,675
1933	...	...	202,960	346,790	66,816

There is a fairly large saw-milling industry in Singapore, which supplies a large part of the needs of the Island and exports sawn timber to a wide range of markets. Durable hardwoods are chiefly obtained from the mainland, and other woods mainly from the neighbouring Netherlands East Indies. Supplies from the latter source are, however, being increasingly replaced by logs from the east coast of Malaya.

3. ANIMAL HUSBANDRY.

There is little prospect of developing an animal industry in the Colony; there is a great lack of pasture, the only herbage which thrives on the rare open spaces in the Colony being *lalang*, which is quite useless for food (although eaten by buffalo) and is in fact harmful to certain animals.

The animal population of the Colony is estimated as follows:—

Buffaloes	...	...	...	19,644	Pigs	...	...	...	...	108,635
Cattle	...	...	...	18,825	Horses	...	...	...	...	395
Sheep and Goats	...	...	...	28,664						

There are substantial imports of livestock and animal products the principal items being as follows in 1933:—

			\$
Buffaloes and cattle	...	...	25,749
Sheep and goats	...	...	1,154,564
Pigs	...	...	51,395
Milk (condensed, thick cream, evaporated, and sterilised) cases	...	...	338,194
Butter (tinned) cwt.	...	...	153,377
Eggs, hundreds...	...	...	2,563,120
Ghee, tons	...	...	897,954
	...	...	6,140,179
	...	...	8,570
	...	...	391,934
	...	...	227,863
	...	...	363,574
	...	...	679
	...	...	565,331

These imports are for the whole of British Malaya and include quantities of goods re-exported to the Federated and Unfederated States.

The only animal exports are of *tanned hides and skins*, exports of which were 565 tons valued at \$410,764 in 1932 and 336 tons valued at \$221,418 in 1933.

There is a possibility of developing pig-breeding sufficiently to render the Colony self-supporting and perhaps also of developing the production and sale of fresh milk, but otherwise the Colony must continue to depend largely on imports.

4.—MINERALS.

The Colony contains little in the way of mineral wealth.

Five tin mines in Malacca were worked sporadically in 1933, the ore produced being 54 tons, the whole of which was sent to Singapore for sale. The industry is entirely in Chinese hands.

There are extensive deposits of phosphate of lime on Christmas Island which are worked by the Christmas Island Phosphates Company, Limited.

The production in 1933 was 91,280 tons valued at \$1,551,760 (£181,039), the whole of which was exported to Japan. Practically the whole labour force is Chinese recruited in Singapore.

There are extensive deposits of coal in Labuan, but they have not been exploited for some years past.

There is a very important tin smelting industry in the Colony, the Eastern Smelting Company, Limited, at Penang and the Straits Trading Company, Limited, at Singapore, being the principal and almost the only tin smelters in the Far East.

Tin smelter production based on smelters' declarations amounted to 46,942 tons in 1933 as compared with 49,945 tons in 1932. The decrease was due principally to the fact that ore from Netherlands India which used to come to Singapore for smelting was no longer imported.

5.—FISHERIES.

There is an important fishing industry in the Colony, the recorded amount of fresh fish landed being not less than 24,822 tons in 1933. In addition there are extensive freshwater fisheries, but actual figures of catch are not available. The catch includes a wide variety of fish.

The landed value of sea fish may be taken at an average of \$84 a ton and the market value at anything from \$135 to \$150. The total value of the catch was therefore about £243,255 landed and between £390,000 and £430,000 in the market.

The total number of registered fishing boats in the Colony in 1933 was 5,529 of which 72 were power driven (49 owned by Japanese) and the remainder were sailing boats, ranging from junks 100 feet long to small native craft 17 feet long with a crew of 2 men.

There were at least 12,612 fishermen employed, 6,652 Malays, 4,479 Chinese, 501 Indians, 903 Japanese, and 76 Eurasians.

The most important method of fishing is by the use of fishing stakes and traps worked inshore. Drift netting and seine netting are next in importance, and various other methods are also employed.

For the most part the industry is controlled by Chinese, who finance the fishermen and buy the whole of their catch.

The Japanese landed about 4,500 tons or 44 per cent. of the fish landed at Singapore during the year 1933, the greater part being caught on the high seas or in foreign territorial waters.

The following table shows the amount of fresh fish landed during the years 1931, 1932 and 1933:—

Year	Singapore Tons	Penang Tons	Dindings Tons	Malacca Tons	Total for the Straits Settlements Tons
1931	11,271	3,726	1,938	1,470	18,405
1932	11,323	4,726	2,048	1,047	20,144
1933	15,837	4,703	2,447	1,835	24,822*

* This increase is due to the inclusion of a supply of fish which had not been estimated previously.

B.

FOOD SUPPLY.

British Malaya is very far from being self-supporting in foodstuffs, and it would be physically impossible to produce locally much of the foodstuffs which are imported.

The most important foodstuff imported is rice, net imports of which in 1933 were valued at about \$33,846,158 (£3,948,718), just over one-half coming from Siam and most of the remainder from Burma. Other important imports are condensed milk, sugar, various animal products, and flour.

VI.—Industry.

The industrial development is doubtless miniature when judged by European, American, or Japanese standards, but it represents an important element in the economic structure of the Colony. With one or two exceptions there is no individual factory of any great capacity; but there is a considerable number of small factories, ranging in size down to the common Chinese shophouses, where a few workmen live and work together in the same premises.

Though tin from the Malay Peninsula was known originally as "Malacca tin" the name was used generally for the whole Peninsula and did not imply that tin was actually produced in Malacca territory. Production there is insignificant, being under 60 tons in 1933. Tin smelting, however, which was formerly carried on by the individual miner at the source of production or by small Chinese smelters, has now become concentrated in the Settlement of Singapore and Penang. Except for one small Chinese refiner the two companies divide the industry between them.

The technical equipment and metallurgical efficiency of the industry is very high, as is shown by the fact that in spite of the greatly increased cost of stores and materials smelting charges have been continually reduced, the total reduction in the last ten years amounting to £3 or more per ton of ore, while the percentage of metal recovered from the ore has steadily increased.

Owing to the presence of the smelting industry Singapore and Penang have become world markets where buyers from all parts of the world compete in the purchase of Straits tin. The tin is sold by the smelting companies on behalf of the miners, who are thus enabled to receive

payment for their produce without risks or delay. The benefit of this free market to the general trade of the Colony must be very considerable.

Rubber provides employment for a fair number of mills and factories. There is a large manufacture of rubber-soled shoes, tyres, hoses, belting, and other technical rubber goods. In 1933 Singapore exported no less than 1,046,700 pairs of rubber shoes to the United Kingdom alone. A small industry ancillary to rubber cultivation is the manufacture of coagulating tanks and other estate equipment from imported aluminium.

There are two coconut oil mills in Singapore and three in Penang, doing a brisk business, particularly for export to India. Oil cakes are also exported.

The engineering industry is well represented in Singapore. Besides the Singapore Harbour Board and many smaller foundries and workshops there is one big firm with extensive plant (including the only steel foundry in Malaya) and a considerable European staff, with a large output of machinery for rubber estates and factories, tin-mining and other purposes, and a ship-building and ship-repairing branch. There are also three other private ship-building and repairing yards.

Brewing is a new industry which has established itself successfully in the last two years. Two separate companies with breweries in Singapore now supply a large part of the beer consumed in Malaya.

Other industries in Singapore include the manufacture of aerated waters, bedsteads, biscuits, bricks and tiles, candles, cement products, cigarettes, electric torch batteries, essential oils, oxygen and acetylene and other gases, earthenware, fertilizers and disinfectants, furniture (rattan, wood, and steel), galvanised buckets and tanks, groundnut oil, ice, inks, iron pans, patent medicines, piping (earthenware and steel), planks, sago-flour, sauces and pickles, shoes, soap (and glycerine), steel trunks, sugar candy (a business which has been much reduced on account of the increased import duty in China), tinned pineapples and varnishes. There are also tanneries, dye works, a motor-car assembly plant (with a capacity of 100 motor cars a month) and printing establishments. Attempt to compile a census of manufacturing industries was made after the 1932 Exhibition, but was not proceeded with owing to the disinclination of manufacturers, in a limited market, to disclose the information.

Industrial development in Penang is on a much smaller scale than in Singapore. Apart from three rice mills, seven rubber mills, three coconut oil mills and the tin-smelting works there are no considerable industries. The rice milling industry is stated to be declining, owing to the number of small mills opened in Kedah, and the cheapness of imported rice. Soap manufacture has long been established and there are several small factories. Cigar making appears to be a growing industry. Cycle assembly exists in a small way. There are several small glass-blowers, but the trade is stated to be disappearing. The dyeing industry has declined owing to the importation of cheap goods from Japan and England. There is a patchouli oil factory, which however is severely affected by competition from Acheen and low prices. A small reptile skin tannery was started successfully a few years ago, importing lizard and python skins from the Malay States and Siam and exporting them either raw or tanned to England, Germany, Holland, and elsewhere: the trade is said to have been affected by the restrictions recently imposed on the exportation of lizard skins from the Federated Malay States.

There are no large scale industries in Malacca territory. There are, however, several rubber factories, engineering works, ice and aerated-water factories, brick-kilns, lime-kilns, potteries, and a gambier factory.

Details of the numbers of persons employed and of the annual output of the works are not available.

The following is a classified list of the industrial establishments in the Colony.

Aerated-water factories ...	...	...	...	...	...	...	16
Attap depots ...	...	...	...	...	...	...	137
Bakeries and biscuit factories ...	...	...	...	...	...	...	77
Blachan factories ...	...	...	...	...	...	...	9
Brick-kilns ...	...	...	...	...	...	...	34
Candle factories ...	...	...	...	...	...	...	11
Carpenters' shops ...	...	...	...	...	...	...	262
Charcoal kilns ...	...	...	...	...	...	...	10
Coconut oil-mills ...	...	...	...	...	...	...	16
Copra factories ...	...	...	...	...	...	...	101
Dye-houses ...	...	...	...	...	...	...	12
Engineering works and iron and brass foundries	...	...	...	...	...	...	38
Fish-curing works ...	...	...	...	...	...	...	46
Gambier factory ...	...	...	...	...	...	...	1
Gas-works ...	...	...	...	...	...	...	2
Groundnut oil-mills ...	...	...	...	...	...	...	4
Ice factories ...	...	...	...	...	...	...	5
Pineapple canneries ...	...	...	...	...	...	...	5
Potteries ...	...	...	...	...	...	...	22
Rice-mills... ..	...	...	...	...	...	...	84
Rubber factories ...	...	...	...	...	...	...	945
Sago factories ...	...	...	...	...	...	...	9
Saw-mills... ..	...	...	...	...	...	...	28
Ship-building yards ...	...	...	...	...	...	...	8
Smithies ...	...	...	...	...	...	...	138
Soap factories ...	...	...	...	...	...	...	22
Sugar refineries ...	...	...	...	...	...	...	8
Tallow melting works ...	...	...	...	...	...	...	21
Tanneries and hide-curing works	...	...	...	...	...	...	21
Tin smelting works ...	...	...	...	...	...	...	3

VII.—Other Economic Activities.

1. **Entrepôt and transit trade** have been the foundation of the economic wealth of the Straits Settlements. Historically, each of the principal Settlements, Malacca, Penang, and Singapore in succession, originated as a depot for European trade with the Malay Peninsula and the East Indian Archipelago. Penang, and to a less extent Malacca, are still important depots for the trade of the neighbouring Malay States, but the most important trading centre to-day is Singapore, which is one of the most important entrepôt ports in the world. It serves not only as a centre for the collection, grading, and repacking of the various commodities collectively known as "Straits produce," originating in Malaya and the East Indian Archipelago, but also as a centre for the distribution of imported manufactured articles of every kind to the same territories.

The trade statistics of Malaya do not distinguish between domestic exports and re-exports, so that it is not possible to give any precise figure of the extent of this trade, but much the greater part of the trade originating in the Malay States passes through the Straits Settlements ports and it may be assumed that most of the trade with the Netherlands East Indies and Borneo (over £21,000,000 in 1933) is of entrepôt character.

Recent changes of tariff policy in other parts of the Empire have produced a profound alteration in the conduct of the business in "Straits produce." Until the wide extension of the list of goods eligible for entry into the United Kingdom at preferential rates which was effected by the Import Duties Act, 1932, the adoption of the principle of Imperial Preference by the Government of India early in 1933, and the extension of the benefits of their preferential tariffs to British Malaya by the Dominions and India at about the same time, there was no particular reason why "Straits produce" of Empire origin should be kept separate from similar produce of foreign origin, and in fact no attempt was made to keep consignments of different origins apart. Under the new conditions it is essential to segregate consignments of most kinds of produce of Empire origin in order that they may be admitted to Empire countries at preferential rates, and the trade is rapidly adapting itself to the new conditions.

So far as the business in manufactured articles is concerned, the adoption of the principle of Imperial Preference by the Federated and Unfederated Malay States has necessitated various alterations in local commercial practice, but here too the trade has rapidly adapted itself to the new conditions.

2. *Tourist traffic* has hitherto been an item of minor importance in the economic life of Malaya. Owing to the great distance from those countries from which visitors might reasonably be expected to come, and to the high cost of transport from those countries, Malaya cannot hope to receive any large volume of visitors, but luxury liners on world tours are coming in increasing numbers and this trade is one which is likely to increase, assisted by the development of aerial communications.

VIII.—Communications.

1. ROADS.

The Colony is provided with an excellent road system well adapted to the needs of local producers.

Excluding the roads and streets within the Municipalities of Singapore, Penang, and Malacca, the mileage of metalled roads in the various Settlements is as follows:—

	Miles.
Singapore	142
Penang	71
The Dindings	34
Province Wellesley	182
Malacca	288
Labuan	20
	737

The mileage in municipal areas is—

Singapore	156
Penang	68
Malacca	17
Total	241

In addition to these metalled roads the Government maintains 131 miles of gravel-road, natural road, and hill path, and further roads and paths are maintained by private firms and individuals and native communities.

Most of the roads in the Colony are now open to very heavy motor lorry traffic and, although the limit is nominally 8 tons gross, in some cases loads of over 14 tons on two axles have been found using the Colony's highways.

2. RAILWAYS.

Except for the Dindings all the Settlements situated in the Malay Peninsula have direct access to the Federated Malay States Railway, which is a Government railway administered by the Federated Malay States Government. The southern terminus of the railway is at Singapore; the main line traverses a corner of Malacca and runs directly through Province Wellesley, and spurs run from the main line to Malacca Town and to Prai on the coast opposite Penang. The length of line on Singapore Island is 16 miles, the Malacca spur is 21 miles, and the Province Wellesley line 39 miles long. The line is of metre gauge and there is a frequent service of trains, the line being fully equal to any demands made upon it for the transport of goods.

3. SEA COMMUNICATIONS.

Communication by sea between the various Settlements is frequent and regular; the Straits Steamship Company, Limited, maintains a weekly mail service between Singapore and Labuan, and the same Steamship Company maintains a constant service between Singapore, Malacca, and Penang. In addition the great majority of the mail and passenger ships which call at Singapore call at Penang also. Christmas Island is served by s.s. *Islander* belonging to the Christmas Island Phosphate Company, which maintains a five-weekly service.

So far as its external sea communications are concerned, Singapore is a nodal point for the steamship services between Europe and the Far East and the Dutch East Indies, and is in frequent sea communication with almost every part of the inhabited world.

The following table shows the number of vessels arriving at the various ports of the Colony in 1933:—

	Vessels over 75 tons.				Vessels of 75 tons* and under.	
	British.		Foreign.			
	No.	Tons.	No.	Tons.	No.	Tons.
Singapore	2,283	4,819,195	4,145	9,405,390	14,261	582,619
Penang	1,336	3,748,996	997	2,588,897	6,070	264,585
Malacca	436	448,507	131	336,428	2,456	49,210
Labuan	134	116,504	3	1,054	1,398	14,638
Christmas Island ...	11	11,620	16	39,534	—	—
	4,200	9,144,822	5,292	12,371,303	24,185	911,052

* Including all native craft irrespective of tonnage.

In addition a small number of ships was entered in the Dindings.

Singapore is a first-class port with all modern conveniences and almost unlimited accommodation in sheltered anchorages. The total length of wharfage with accommodation alongside is 11,077 feet, of which 1,273 feet have a minimum depth of less than 25 feet alongside and 4,412 feet have a minimum depth of more than 33 feet alongside.

There are five dry docks of which the largest, the King's Dock, has a maximum length of 879 feet, breadth 100 feet, and 34 feet of water on the sill at ordinary high water.

Penang is a modern harbour with most ordinary conveniences. There is practically unlimited mooring accommodation in the roads fairly well sheltered in all weathers, including 15 to 20 berths within easy reach of the quays. The total length of Swettenham pier, 1,200 feet, is available for coming alongside with a minimum depth of 32 feet.

The Prai River wharves on the mainland side of the harbour have 2,400 feet of wharfage with a depth of about 14 feet.

There is a small dry dock at Prai, maximum length 350 feet, breadth 52 feet and 14½ feet of water on the sill at ordinary high water.

Malacca is an open roadstead, and neither it nor Lumut in the Dindings are suitable for large vessels.

Victoria Harbour, Labuan, is a small harbour and contains a jetty and three wharves with a total length of 582 feet with 17 feet of water alongside. There are simple conveniences and equipment in the harbour but no dock.

4. AIR COMMUNICATION.

At present the Imperial Airways and the Royal Netherlands Airways provide between them a fast, regular and reliable twice-weekly air mail service, the former plying between Singapore and London and the latter between Singapore and Amsterdam and between Singapore and the Netherlands Indies. The aircraft of both companies call at Alor Star (Kedah) *en route*. The time taken in transit between Singapore and London varies from 8 to 9 days.

IX.—Tariff.

The tariff of the Straits Settlements is a very brief one, comprising a few duties imposed for revenue purposes, at present confined to alcoholic liquors, tobacco, and petroleum (kerosene and motor spirit). In respect of liquors and tobacco there are preferential rates of duty for imports of Empire origin, and the duty of 20 per cent. *ad valorem* on motor-cars, which is collected at the time of registration (the car being deemed to be in bond until registered) is not payable on cars of British Empire make.

X.—Trade Representatives.

The "Malayan Information Agency" is maintained in London by the Governments of the Straits Settlements and Federated Malay States. Its primary object is to advertise the productions and attractions of Malaya, to furnish to inquirers interested in these parts, or desirous of becoming acquainted with them, information on facilities for trade, travel, and exploration and opportunities for employment, and to deal with questions relating to Malayan products imported into the United Kingdom.

One of His Majesty's Trade Commissioners, responsible to the Department of Overseas Trade, is stationed at Singapore, and watches over the commercial interests of the United Kingdom in the Malay Peninsula and Archipelago.

FEDERATED MALAY STATES.

I.—Situation, etc.

The Federated Malay States occupy the middle portion of the Malay Peninsula and extend from latitude 5° 55' North to 2° 22' North and longitude 103° 38' East to 100° 22' East. They consist of four Malay States under British protection—Perak, Selangor, Negri Sembilan, and Pahang, the Rulers of which have entered into a Federation in which there is a uniform system of law and certain services are administered in common.

The Federation is bounded on the north by Siam and the Unfederated Malay States of Kedah, Kelantan, and Trengganu, and on the south by Johore. The east and west are bounded by the sea. The Malay Peninsula is divided through most of its length by a mountain range running principally from north to south. Perak, Selangor, and Negri Sembilan lie to the west of this range and Pahang to the east. The central portion of the Federation is mainly mountainous, the highest mountain rising to 7,184 feet. There is not at present much development in the higher lands but attempts are being made to open them up. A number of rivers run more or less east to west. Settlement and development have largely followed the river courses. The country was formerly covered with tropical forest, which still remains in the undeveloped areas.

The area is as follows:—

	<i>Square Miles</i>					
Perak	...	...	...	...	...	7,800
Selangor	...	...	...	...	...	3,150
Negri Sembilan	...	...	...	...	...	2,550
Pahang	...	...	...	...	...	14,000
Total	...	...	...	...	...	27,500

By an agreement dated at Singapore, 6th June, 1934, the Dindings are to be ceded to Perak, in consideration for a payment of \$86,850. The agreement will come into force three months after the necessary legislation for the transaction has been passed by Parliament.

By the retrocession of the Dindings the area of Perak will be increased by 180 square miles and the population by about 18,130 persons.

Pahang, the largest of the States, is much less highly developed than the three western States.

The principal features of the climate of Malaya are uniform temperature, high humidity, and copious rainfall. By uniform temperature is meant the lack of serious temperature variation throughout the year; the daily range of temperature is generally between 10° and 15° F. at coastal stations and between 15° and 20° F. at inland stations, and there is, of course, considerable variation between the temperatures at different altitudes. Excessive temperatures are never experienced. Four seasons may be distinguished, i.e., the south-west monsoon, from the end of May to September; the north-east monsoon, from the end of October to March, and two short intervening seasons. Rainfall is fairly considerable throughout the year. The total annual rainfall varies at different stations from 65 inches to as much as 239 inches (in a hill station), but the latter is quite exceptional.

Although the heat is not excessive and the nights are reasonably cool, Europeans find it desirable to seek a change of climate after a few years.

All land in the Federated Malay States not held under title is vested in the Ruler of the State. A system of registration based on the Torrens system is in force. Three forms of land tenure may be distinguished, a grant in perpetuity, a lease, and entry in the *mukim* register. The latter is the form under which small-holders are registered. A grant in perpetuity does not constitute freehold, for the grant is issued subject to the Land Code and to any conditions set forth in the grant. All land alienated after 1909 is subject to periodical revision of rent. Mining rights are reserved and are subject to special grants.

Certain lands have been reserved exclusively to Malays under the Malay Reservations Enactment, and may not be alienated to a non-Malay. Furthermore, land suitable for wet rice cultivation may only be alienated for that cultivation.

The total area alienated under permanent title to 31st December, 1933, was as follows:—

						<i>Building and Agricultural. Acres.</i>	<i>Mining. Acres.</i>	<i>Total. Acres.</i>
Perak	...	...	...	...	...	917,574	116,410	7,033,984
Selangor	...	...	...	...	...	743,065	49,839	792,904
Negri Sembilan	...	...	...	...	...	538,352	8,497	546,849
Pahang	...	...	...	...	...	375,292	28,645	403,937
						2,574,283	203,391	2,777,674

II.—Population.

At the 1931 census the total population was 1,713,096, divided as follows:—

Perak	...	...	...	...	765,989
Selangor	...	...	...	...	533,197
Negri Sembilan	...	...	...	...	233,799
Pahang	...	...	...	...	180,111

The racial distribution was:—

Malays	...	...	...	...	...	...	...	443,618
Other Malaysians	...	...	...	...	...	...	...	150,113
Chinese	...	...	...	...	...	...	...	711,540
Indians	...	...	...	...	...	...	...	379,996
Europeans	...	...	...	...	...	...	...	6,350
Others	...	...	...	...	...	...	...	21,479

The population has been increasing rapidly for the last generation or so. Between 1921 and 1931 it increased from 1,324,890 to 1,713,096 or by 29·3 per cent. The increase in the two previous intercensal periods was 27·7 per cent in 1911-1921 and 52·8 in 1901-1911. Increases have been shown by all the States, by all the principal races and by both sexes but it may be noted that:—

- (1) the rate of increase has been greatest in Selangor and least in Pahang;
- (2) the immigrant Chinese and Indians have increased more than the native Malays; and
- (3) the female population has increased faster than the male, correcting a previously unsatisfactory sex-ratio.

Since 1931 there has been a substantial excess of emigration and the estimated population for mid-year 1933 was 1,598,000.

The principal towns (with their populations in 1931) are Kuala Lumpur, the capital of the Federation, 111,418; Ipoh, the largest town in Perak, 53,183; Taiping, the principal tin-mining centre, 30,070; and Seremban, 21,453, and Klang, 20,193, rubber centres.

Following are the figures of occupations returned in 1931:—

Total occupied population	...	...	...	...	...	...	...	899,300
Agriculture	...	...	...	...	...	...	...	507,800
Mining and Quarrying	...	...	...	...	...	...	...	82,800
Commerce and Finance	...	...	...	...	...	...	...	70,000
Manufacture	...	...	...	...	...	...	...	53,200

Among the Malays, agricultural pursuits greatly predominate, with fishing as the next most common. The Chinese comprise the bulk of the trading classes and practically all the mining labourers; but they are also largely engaged in agriculture, both on their own account and as labourers. The Indians are almost all engaged as labourers in the rubber industry.

The importance of immigration and emigration in the Federated Malay States, as in British Malaya generally, has already been indicated. Although there is normally a natural increase of population, the great increase in the last 40 years (from 373,000 in 1889 to 1,723,000 in 1931) has been due to immigration. The Malays themselves are not aboriginal inhabitants but only the earliest settlers; immigration of Malay peoples from the neighbouring islands has been proceeding since mediaeval times and still continues, but in recent years this has been overshadowed by the large immigrations from China and South India. Both started before the era of British protection but have grown vastly since. In the case of Indian labour, the movement is organized and closely controlled by the Malayan Governments in concert with the Government of India. Chinese immigration is not so organized but it is subject to regulation in the interests of the immigrant and to the fixing of a maximum number of immigrants in each year. The Indians and Chinese, like the European population, are in the main only sojourners in Malaya and most of them eventually return with their savings to India or China; but many of them settle permanently and the number of Malaya-born Chinese and Indians is increasing.

In the last three years, owing to the trade depression, there have been excesses of departures over arrivals amounting to 215,021 in 1931, 162,978 in 1932 and 38,449 in 1933, for the whole of Malaya. Precise figures for the Federated Malay States separately in these periods are not available.

III.—Finance.

A.—CURRENCY AND BANKING.

The currency in circulation is that of the Straits Settlements (\$1 = 2s. 4d.).

2. There are altogether fourteen banks doing business in the Federation. The most important are the Chartered Bank of India, Australia, and China, the Hong Kong and Shanghai Banking Corporation (of which the head office is in Hong Kong) and the Mercantile Bank of India. There are three locally registered banks with their capital in Straits dollars. There are also two Chinese banks, two Japanese, and four Indian.

There were 243 Co-operative Societies in the Federation on 31st December, 1933, with a total paid-up share capital of \$2,722,384 and a membership of 29,273.

There were 62 Rural Credit Societies with paid-up share capital of \$75,159 and a membership of 1,652.

There were 126 Indian Estate Labourers' Societies with paid-up share capital of \$237,383 and a membership of 15,971.

Co-operative Societies are generally popular and there has been a very marked increase in the number of Indian Estate Labourers' Societies.

3. There is a Post Office Savings Bank in the Federation, the number of depositors on the 31st December, 1933, being 51,539 and the aggregate amount standing to their credit \$5,444,400. The number of depositors increased during the year by 4,159 and the amount on deposit by \$847,448.

There are no Agricultural or Co-operative Banks in the Federation, but agricultural and building loans are granted by the Planters Loans Board—a Government institution with a capital of \$4,000,000. There were outstanding on the 31st December, 1933, 49 agricultural loans and 84 building loans of a total amount of \$3,283,791.

B. PUBLIC FINANCE

1. *Public Debt.*

(a) At the 31st December, 1933, the total amount of the public debt was \$96,185,714 (equivalent to £11,221,667) made up as follows:—

		\$
Straits Settlements Sterling Loan (1921-22)	...	80,185,714
Local Loan (1931)	... ..	16,000,000
		96,185,714

(b) Interest and Sinking Fund charges on the Straits Settlements Loan are \$4,271,143 and \$801,857 respectively, and in addition a contribution of \$1,143,857 is made to a supplementary Sinking Fund.

Interest and Sinking Fund charges on the local loan amount to \$880,000 per annum.

(c) The accumulated Sinking Fund in respect of the Straits Settlements Loan amounted at the 31st December, 1933, to \$21,701,152.

2. *Revenue.*

(a) *Analysis of Revenue (on basis of Estimates for 1934).*

Self-balancing Departments.

	Revenue.	Expenditure.	Balance.
	\$	\$	\$
Posts and Telegraphs	2,200,000	2,152,135	+ 47,865
Railway	9,100,000	9,915,945	— 815,945
Electrical Department	2,758,625	1,122,678	+1,635,947
	14,058,625	13,190,758	+ 867,867

Net surplus \$867,867.

General Revenue (excluding receipts from Colonial Development Fund).

	\$	Percentage.
I. Customs	19,360,600	44.8
II. Opium Revenue	4,200,000	9.7
III. Excise, Licences, and other internal revenue	3,357,784	7.8
IV. Lands, Mines, and Forests	5,262,272	12.2
V. Fees, re-imbursements, etc.	4,005,455	9.3
VI. Municipal	2,694,275	6.2
VII. Interest, rents, and other revenue from Government Property	2,908,774	6.7
VIII. Surplus on Self-balancing Departments	867,867	2.0
IX. Miscellaneous	549,736	1.3
Equivalent to £5,040,789.	43,206,763	100
Revenue of self-balancing Departments set off against Expenditure	13,190,758	—
	56,397,521	

(b) *Analysis of Import Duties, 1933.*

It is not possible to give accurate figures as to the amount of duty collected on goods imported from the United Kingdom, the rest of the Empire and foreign countries, but the following table shows the amount of duty collected according to classes.

	\$
Class I	6,458,329
Class II	60,218
Class III	4,549,970
Class IV (Parcel Post)	66,514
	11,135,031
Equivalent to	£1,299,087

3. *Expenditure.*

Analysis of Expenditure (on basis of Estimates for 1934 and excluding Loan and Colonial Development Fund Expenditure).

	\$	Percentage.
I. Public Debt Charges	7,104,878	15.4
II. Administration	16,634,569	35.9
III. Economic Development	5,369,211	11.6
IV. Social Services	8,504,779	18.4
V. Defence	1,263,183	2.7
VI. Pensions, etc.	7,415,902	16.0
Equivalent to £5,400,794	46,292,522	100
Expenditure of self-balancing Departments set off against Revenue	13,190,758	—
	59,483,280	

IV.—Trade Statistics.

For statistical purposes the external trade of the Federated Malay States is included, with that of the Straits Settlements and the Unfederated States, in the general Malayan returns of which particulars will be found in Section IV of the memorandum relating to the Straits Settlements.

Separate returns of the import and export trade of the Federated Malay States are kept, but as these include trade with other parts of Malaya, much of which, at any rate in the case of the Straits Settlements, is of a transit character, they give little indication of the true origin of imports or destination of exports. In these circumstances the analysis of countries of origin and destination in the table below must be regarded as being in a different category from similar analyses in other memoranda.

(i) *Exports and Imports of the Federated Malay States (including Bullion and Specie).**Total Exports.*

To.	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	\$	\$	\$	\$
1913	26,627,845	118,001,358	4,040,295	148,669,498
1930	29,451,689	129,498,502	54,701,853	213,652,044
1931	11,439,937	83,675,992	30,061,254	125,177,183
1932	8,132,572	56,873,079	22,845,630	87,851,281
Equivalent to	£948,800	£6,635,193	£2,665,323	£10,249,316
1933	11,138,356	65,176,900	35,570,679	111,885,935
Equivalent to	£1,299,475	£7,603,972	£4,149,912	£13,053,359

Total Imports.

From.	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	\$	\$	\$	\$
1913	15,929,443	65,912,678	4,567,036	86,409,157
1930	28,067,242	106,612,203	33,340,973	168,020,418
1931	15,261,157	68,223,058	22,716,996	106,201,211
1932	8,576,467	47,890,208	14,666,626	71,133,301
Equivalent to	£1,000,588	£5,587,191	£1,711,106	£8,298,885
1933	8,514,485	43,992,236	14,622,429	67,129,150
Equivalent to	£993,357	£5,132,427	£1,705,950	£7,831,734

(ii) *Total Exports by Countries of Destination, 1933.*

Countries of immediate destination.	\$	Equivalent to £
Straits Settlements	63,170,699	7,369,915
Unfederated Malay States	975,636	113,824
United Kingdom	11,138,356	1,299,475
Rest of Empire	1,030,565	120,232
<i>Total Empire</i>	<u>76,315,256</u>	<u>8,903,446</u>
United States of America	21,222,399	2,475,947
Other foreign countries	14,348,280	1,673,966
<i>Total foreign countries</i>	<u>35,570,679</u>	<u>4,149,913</u>
GRAND TOTAL	<u>111,885,935</u>	<u>13,053,359</u>

(iii) *Domestic Exports by Classes, 1933.*

Class.	Value.	Equivalent to £
	\$	
I.	1,954,951	228,078
II.	104,021,577	12,135,850
III.	729,547	85,114
IV. (Parcel Post)	91,260	10,647
V. (Bullion and Specie)	1,151,124	134,298
	<u>107,948,459</u>	<u>12,593,987</u>

(iv) *Principal Domestic Exports, 1933.*

Article.	Total Quantity.	Total value.	Principal countries of destination with amounts in \$'000.
		\$	
<i>Class I—</i>			
Pineapples, canned	7,866 tons	908,551	United Kingdom (676), Canada (153), Holland (30), Germany (28), Irish Free State (5), United States America (5).

(iv) *Principal Domestic Exports, 1933.*—continued.

Article.	Total Quantity.	Total Value. \$	Principal countries of destination with amounts in \$'000.
<i>Class II—</i> Rubber	248,356 tons	57,582,914	United States of America (20,707), United Kingdom (8,808), Singapore (5,971), Penang (5,529), France (4,900), Malacca (3,224), Italy (2,102), Germany (1,868), Japan (1,720), Belgium (820), Holland (616), Australia (268), Spain (230), Ceylon (172), China (167).
Tin Ore	31,397 "	37,293,705	Penang (19,318), Singapore (17,975).
Copra	86,523 "	5,652,700	Penang (3,333), United Kingdom (949), Germany (394), Singapore (385), Holland (268), Norway (113), Italy (87), Sweden (52), France (36).
Palm Oil	7,765 "	947,354	Singapore (560), Sumatra (185), United Kingdom (88), United States of America (31).
Rubber latex		582,166	United States of America (372), Malacca (92), United Kingdom (43).
Timber, sawn... ..	9,655 "	464,045	Penang (407), Malacca (39).
Scheelite	918 "	340,760	United Kingdom (327).
Jelutong	645 "	242,242	Singapore (149), United States of America (93).
Coal	32,259 "	180,829	Penang (99), Singapore (64).
Palm Kernels... ..	1,309 "	114,484	Holland (37), Germany (35), United Kingdom (34).
<i>Class III—</i> Tin (block)	218 "	371,739	Singapore (371).
Rubber Manufactures		108,355	Singapore (45), Hong Kong (17), Union of South Africa (11), United Kingdom (11), Siam (8), Burma (3), United States of America (2), Ceylon (2), Penang (2), Australia (2), China (2).
Tuba Root	327,213 lb.	78,884	United Kingdom (65), Singapore (11).
<i>Class V—</i> Gold Bullion	26,981 oz.	1,151,124	Singapore (1,135), British Possessions and Protectorates (9), Penang (7).

(v) *Total Imports by Countries of Origin, 1933.*

Country of immediate origin.	\$	Equivalent to £
Straits Settlements	35,830,515	4,180,227
Unfederated Malay States	1,833,443	213,902
United Kingdom	8,514,485	993,356
Rest of Empire	6,328,278	738,299
<i>Total Empire</i>	52,506,721	6,125,784
Continent of Europe	1,606,396	187,413
Other foreign countries	13,016,033	1,518,537
<i>Total foreign countries</i>	14,622,429	1,705,950
GRAND TOTAL	67,129,150	7,831,734

(vi) *Imports of Merchandise by Classes, 1933.*

Class.	Value. \$	Equivalent to £
I.	31,973,172	3,730,203
II.	2,373,260	276,880
III.	32,284,688	3,766,547
IV.	491,560	57,349
	67,122,680	7,830,979

In addition there were imports of bullion and specie to a value of \$6,470 equivalent to £755.

(vii) *Principal Imports, 1933.*

Article.	Total Quantity.	Total Value. \$
<i>Class. I</i> Rice and Padi—		
White	192,039 tons	11,824,014
Cargo	7,923 "	369,300
Padi	2,363 "	82,201
	202,325 "	12,275,515

(vii) *Principal Imports, 1933.*—continued.

<i>Class I—contd.</i>							<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i> \$
Tobacco—									
Cigarettes							1,712,678 lb.	3,479,093	
Unmanufactured, native							1,515,381 „	428,428	
Manufactured, native							138,991 „	91,742	
Manufactured, other							16,312 „	71,131	
Cigars							2,534 „	13,638	
							3,385,896 „	4,084,032	
Condensed Milk (all kinds)							—	1,843,542	
Sugar, coarse and refined... ..							21,316 tons	1,735,267	
Animals, living for food—									
Swine							50,410	971,189	
Buffaloes... ..							7,874	326,513	
Cattle							2,968	95,074	
Sheep							6,778	56,096	
Goats							1,290	10,571	
							69,320	1,459,443	
Vegetables (all kinds)							13,288 tons	1,304,919	
Feeding stuffs for animals—									
Rice meal or bran							31,134 „	857,925	
Dholl							1,596 „	153,024	
Oil cakes							2,487 „	111,398	
Gram							491 „	40,302	
Other kinds							537 „	46,806	
							36,245 „	1,209,455	
Fish—									
Dried and Salted							3,260 „	687,249	
Fresh							1,143 „	250,144	
Canned							431 „	105,467	
Other							9 „	13,080	
							4,843 „	1,055,940	
Wheat flour							11,136 „	908,484	
Meats—									
Poultry and game							—	494,693	
Pig products							57 tons	54,757	
Beef, frozen, fresh or salted							87 „	50,869	
Mutton and lamb, frozen, fresh or salted							61 „	34,109	
Tinned and canned							29 „	24,333	
Other kinds							58 „	38,356	
								697,117	
Spirits—									
Whisky							33,396 gal.	340,765	
Brandy							22,045 „	200,391	
Gin							7,650 „	43,208	
							63,091 „	584,364	
Eggs, fresh and salted							255,278 hundreds	546,194	
Ale, Beer, etc.							238,915 gal.	522,562	
Fruits—									
Fresh							1,764 tons	252,416	
Dried or preserved							819 „	172,748	
Canned or bottled							144 „	50,299	
							2,727 „	475,463	
Butter and substitutes—									
Butter, tinned or frozen							146 „	151,740	
Ghee							248 „	185,203	
Margarine							41 „	23,096	
							435 „	360,039	
Beans							3,981 „	321,986	
Tea							974,797 lb.	319,622	
Biscuits							19,605 cwt.	265,636	
Curry Stuffs							22,115 „	230,947	

V.—Natural Resources.

A.

1. AGRICULTURE.

Agriculture and mining are both of major importance in the economy of the Federated Malay States. The former is carried on both by Europeans and by Asiatics. There are many small-holdings of one-half to five acres owned by Asiatics, and quite a number of large estates of between five hundred and five thousand acres owned chiefly by European companies, but also by Asiatics, as well as numerous properties of intermediate size.

Agricultural crops can be classified in three categories:—those grown both on estates and on small-holdings, those grown only on large properties, and those grown exclusively on small-holdings by Asiatics. The first category includes the major permanent crops, rubber and coconuts, with which coffee, bananas, pineapples, or tapioca may be grown as catch crops, and also includes tea, which is in its infancy as an estate crop in Malaya. The second category is confined to oil palms. The third comprises the important rice crop, minor food crops such as maize and groundnuts, fruit, vegetables, arecanuts and tobacco.

(a) Crops Grown by Europeans and Asiatics.

Rubber.—British Malaya is the most important rubber-producing area in the world and is estimated to produce nearly 60 per cent. of all rubber tapped. The greater part of the industry is in the Federated Malay States, where the total area under rubber at the end of the year 1933 was estimated to be 1,523,278 acres.

The distribution of areas is shown below:—

						<i>Holdings of 100 acres and over.</i>	<i>Holdings of under 100 acres.</i>	<i>Total.</i>
						<i>Acres.</i>	<i>Acres.</i>	<i>Acres.</i>
Perak	...	...	...	...	...	274,020	251,748	525,768
Selangor	...	...	...	...	...	342,478	155,520	497,998
Negri Sembilan	...	...	...	...	...	274,199	82,159	356,358
Pahang	...	...	...	...	...	66,890	76,264	143,154
						957,587	565,691	1,523,278

The production of rubber during the past five years was:—

						<i>Estates of 100 acres and over.</i>	<i>Estates of less than 100 acres.</i>	<i>Total.</i>
						<i>Tons.</i>	<i>Tons.</i>	<i>Tons.</i>
1929	...	...	...	...	...	144,578	not available	—
1930	...	...	...	...	...	140,789	110,206	250,995
1931	...	...	...	...	...	141,457	105,378	246,835
1932	...	...	...	...	...	140,525	93,371	233,896
1933	...	...	...	...	...	137,363	110,848	248,211

Rubber is produced almost exclusively for export and the total local consumption in the whole of Malaya in 1933 was only 2,878 tons.

A scheme to regulate the production and export of rubber covering British Malaya, Netherlands East India, French Indo-China, Ceylon, North Borneo, Brunei, Sarawak, India and Siam came into force on the 1st June, 1934. In the Federated Malay States regulation takes the form of regulating exports and limiting stocks. Every individual holding, no matter how small, is assessed and given export rights. The cost of administration is met from a cess of one cent a pound on all rubber exported.

The marked rise in the price of rubber has led to considerable improvement in conditions on estates and the easing of the economic situation has facilitated the resumption of a higher standard of working than was possible under the conditions of drastic economy which prevailed during 1932.

There is no doubt, however, that as a result of the depression, it has become established that estates can be profitably operated at costs far below those which formerly were considered economically profitable.

On the native small holdings the increase in price resulted in further extension of the areas tapped. The total area of tappable rubber on estates of less than 100 acres in the Federated Malay States which was out of tapping at the end of 1933 was estimated to be approximately 45,000 acres as compared with 79,000 acres in December, 1932.

As the result of an investigation into the question of tapping practice on small rubber holdings it is considered that if bark consumption continues at the present rate, the existing reserves are sufficient for a further tapping period of over seven years.

Rapidly extending applications of rubber in new directions are being made resulting in increasing exports of raw and concentrated latex as is shown by the following table:—

EXPORTS OF LATEX FROM MALAYA, 1931-1933.

<i>Year.</i>	<i>Revertex (dry rubber content). Tons.</i>	<i>Concentrated (dry rubber content). Tons.</i>	<i>Total. Gallons.</i>
1931...	329	1,611	752,088
1932...	1,512	3,680	1,707,639
1933...	3,008	1,287	3,594,603

A bulk storage plant for the storage of latex awaiting shipment and for its transference by pumping to tank steamers for conveyance to its destination has been installed at Singapore.

Official rubber research in Malaya is in the hands of the Rubber Research Institute. The aim of the Institute as defined in the recent Report of the Commission of Inquiry into its Constitution, Administration, and Working, is to employ the sciences for the betterment, in the sense of economic advancement, of rubber growing in Malaya. Research is conducted into both the production and consumption aspects of rubber and special attention is given to the provision of advice to estates and to small-holders.

The staff of the Institute works in close collaboration with the staff of the laboratories of the London Advisory Committee for Rubber Research (Ceylon and Malaya), which is maintained by grants from the Institute and from the Rubber Research Scheme, Ceylon.

The work of the Institute is primarily connected with all scientific problems in relation to production including investigations on soils, improvement in planting material, tapping systems, diseases and pests, the production of various types of raw rubber suitable for manufacturing purposes, and the marketing of latex of good quality, including methods of concentration. Investigations on modified types of raw rubber suitable for specific uses are carried out in collaboration with the staff of the London Advisory Committee laboratories.

A Small-holders' Advisory Service was inaugurated in the middle of 1934 and a number of Asiatic Rubber Instructors were appointed under the Scheme and allocated for duty to various districts for instructional work. It is anticipated that the full cadre for this service will be available in 1936.

The Institute also owns an Experiment Station of about 1,300 acres of which about 800 acres are planted. In addition experimental work is carried out on a number of estates throughout the country.

The publications of the Institute are distributed free to all estates in Malaya. In addition the staff of the Institute prepares articles on rubber cultivation, preparation, etc., for publication in the Malay and Chinese vernacular publications of the Department of Agriculture, Straits Settlements and Federated Malay States.

Collaboration in certain matters of interest is also maintained with the rubber research organisations in Ceylon and Netherlands India (Java and Sumatra).

Coconuts and Coconut Products.—Coconuts are widely distributed over Malaya. Perak and Selangor possesses large estates devoted to this crop and there are well-defined blocks of small holdings in the coastal districts of these two States, but throughout Malaya there is hardly a commoner sight than the few palms planted around the homesteads of Malays and also of other Asiatic inhabitants, and this makes even a rough estimate of the total production of coconuts in the Federated Malay States very difficult. Nuts produced in the inland districts are all consumed fresh.

A close census of coconut areas was made in 1930 and no further census has been deemed necessary in subsequent years. However, certain new areas have been opened up recently in Selangor and the estimated acreage is now as follows:—

								Areas.
Perak	...	...	...	...	...	...	...	108,940
Selangor	...	...	...	...	...	...	...	110,584
Negri Sembilan	...	...	...	...	...	...	...	5,966
Pahang	...	...	...	...	...	...	...	14,918
								240,408

Market conditions for coconut products have for some years been adversely affected by the prevailing economic situation. Estate crops are used almost entirely for the production of copra, although a feature of recent years has been the increased local production and export of coconut oil.

No figure can be given of the copra produced in Malaya: imports from the Netherlands East Indies are considerable and are used both in the production in Malaya of coconut oil and for grading with Malayan produce for re-export.

The following table shows the exports of copra from the Federated Malay States during the past five years:—

Year.			Tons.	\$
1929	...	...	69,027	10,667,500
1930	...	...	71,043	9,492,322
1931	...	...	65,583	5,504,490
1932	...	...	74,085	7,124,182
1933	...	...	86,523	5,652,700

Pineapples.—The area planted with pineapples is steadily increasing. From 4,910 acres in 1930 the area increased to 6,292 acres in 1931, of which 5,207 acres were in Selangor. In 1932, Selangor increased its acreage by a further 1,732 acres. The total planted area at the end of 1933 in the Federated Malay States was 9,789 acres. Of this area 7,618 acres were in Selangor, 4,090 acres being planted as a sole crop.

There are two pineapple canning factories in Selangor (the only ones in the Federated Malay States) both owned and operated by Chinese. One of these has recently introduced peeling machinery, and working conditions in the factories have generally improved in the past few years.

Efforts are being made to establish the cultivation of pineapples as a main crop and to improve the conditions of the pineapple industry generally.

Exports of canned pineapples from the Federated Malay States during the past five years are as follows:—

Year.		Tons.	\$
1929	... ..	3,337	497,999
1930	... ..	4,455	562,600
1931	... ..	4,843	538,058
1932	... ..	8,151	912,558
1933	... ..	7,866	908,551

Coffee.—Most of the coffee grown in the Federated Malay States comes from Selangor where there are 6,020 acres planted. The total area under cultivation in the Federation in 1933 was 9,385 acres as compared with 8,787 acres in 1932. Existing plantations are mostly of *Liberica* coffee but the greater attention which has recently been given to the possibility of satisfying local demand from local supplies has increased the interest shown in the possibility of cultivating *Arabica* coffee in the Highlands of Malaya. Small experiments with *Arabica* coffee have been conducted by the Department of Agriculture for some years past and reports on samples submitted to London have been favourable.

Several brands of locally-grown and prepared coffee are now found on the retail market at prices ranging from 30 to 70 cents per pound. This does not, however, appear to have much influence on the quantity imported into Malaya.

Tea.—Interest in this crop has continued to increase and at Cameron Highlands plantations have been opened by a number of individuals. Considerable interest centres on the quality of the tea likely to be produced in this region and in 1931 the experimental tea factory at the Tanah Rata Experiment Station, Cameron Highlands, was completed and started work. Samples of tea from this factory prepared under varying conditions and at different seasons of the year are submitted regularly to London for valuation and report. These reports show that the tea is of satisfactory quality and can be classed with medium Ceylon teas. Samples of lowland tea from the Central Experiment Station, Serdang, have also been sent to London and proved to be of only slightly less value, ranking with common Ceylon teas.

A commercial consignment of upland tea from the Tanah Rata Experiment Station was sent to London and sold on the open market in the last quarter of 1933. The price realised averaged 1s. 1½d. per lb. and confirmed previous valuation. The consignment was well received and obtained a favourable report.

The total area planted with tea in the Federated Malay States in 1933 was 1,786 acres as compared with 1,643 acres in 1932. Of this area, 684 acres of upland tea were planted at an elevation of over 4,000 feet in the Highlands.

Tea sold locally, at between 35 to 60 cents per pound according to grade, is at present entirely lowland tea. It is mostly black tea but it appears that considerable scope may exist for the preparation of green tea for consumption by Chinese. Green tea constitutes a considerable proportion of the total imports, while local growers are all Chinese small-holders, mostly in Selangor.

(b) *Crops grown entirely on Large Estates.*

Oil Palms.—The total area planted with oil palm at the end of 1933 was returned as follows:—

									Acres.
Selangor	...	...	...	...	...	...	...	...	17,426
Perak	...	...	...	...	...	...	...	...	13,505
Negri Sembilan	...	...	...	...	...	...	...	...	1,199
Pahang	...	...	...	...	...	...	...	...	788
									32,918

This represents an increase of some 300 acres in the year, almost entirely confined to Selangor and Perak.

All oil and kernels produced are exported, with the exception of a small quantity of oil used for the local manufacture of soap. Production has steadily increased but prices have continued to decline. The following table shows production during the past five years together with the average annual price c.i.f. Liverpool.

Year.		Tons.	C.i.f. Liverpool.
			£ s. d.
1929	... ..	1,941*	33 2 0
1930	... ..	3,288*	22 19 0
1931	... ..	4,480	16 19 0
1932	... ..	7,076	16 4 6
1933	... ..	9,333	14 10 0

Three new factories were in operation by the end of 1933. Of the total of 18 factories, three use the press system and the remainder employ the centrifugal system.

Bulk shipment of palm oil has made headway. The Federated Malay States Railways have in operation a scheme for transport in suitable tank wagons and the Singapore Harbour Board has completed an installation of three 500-ton tanks at Singapore with the necessary pumping arrangements to receive oil from sea or rail. This installation has been leased to a local trading company, which has also erected bulking tanks in Selangor. Another organisation ships oil in bulk direct from the Selangor coast.

Considerable research work in connexion with oil palms has been carried on for several years by the Department of Agriculture, Straits Settlements and Federated Malay States and a special handbook on the industry as a whole was published in 1934 setting out the results of these researches.

* Exports.

(c) *Crops grown exclusively by Asiatics.*

Rice is grown by Malays throughout the Federation, wherever there is suitable land in populated areas. Local production supplies about one-third of the total requirements, the balance is imported from Burma and Siam.

The crop season in most places runs from July to mid-January or February but local variations occur.

The estimated area of rice land and the yield of unhusked rice to the nearest 1,000 gallons (the local unit of measurement, the *gantang*, is equivalent to a gallon) in the season 1932-33 were as follows:—

	Wet Rice.		Dry Rice.		Total.	
	<i>Acres.</i>	<i>Gantangs.</i>	<i>Acres.</i>	<i>Gantangs.</i>	<i>Acres.</i>	<i>Gantangs.</i>
Perak	88,620	24,330,000	18,350	2,927,000	106,970	27,257,000
Selangor	25,010	4,936,000	3,800	412,000	28,810	5,348,000
Negri Sembilan	33,930	9,948,000	460	52,000	34,390	10,000,000
Pahang	39,690	7,876,000	4,300	356,000	43,990	8,232,000
Total	187,250	47,090,000	26,910	3,747,000	214,160	50,837,000

About 700 *gantangs* of unhusked rice are equivalent to one ton of cleaned rice, and the total amount of the crop in terms of cleaned rice was about 72,600 tons. This constituted a record exceeding the previous year's crop by about 6,100 tons. It exceeded the record crop of 1931 by about 17,300 tons and the previous record of 1921 by a slightly larger amount.

The increase in crop is proportionately much greater than the increase in the planted area. This is attributable, in part to favourable weather conditions, but in part also to more thorough cultivation, the much wider use of pure strain seed, and greater attention to the control of pests, especially rats.

It is part of the Government's policy to encourage the production of rice, and steps are being taken to that end, e.g., by seed distribution and experiments in varietal cultivation.

Tobacco.—Local production, by Malay small-holders and Chinese gardeners, has greatly increased in recent years owing to the increase in import duty and the non-imposition of an excise duty, but is still relatively insignificant. It is difficult to estimate the area under tobacco owing to its being grown in scattered plots and with but little regard to season, but it is probably safe to assume that the total area annually planted is twice the area found at any one time; it was estimated that at the end of 1933 the areas under tobacco in Perak and Selangor were 1,600 and 273 acres respectively.

Up to the present locally grown tobacco has consisted of poor quality leaf which has been used only for native consumption. Considerable attention has been paid to this crop by the Department of Agriculture and numerous experiments have been carried out. Two lines of development appear to be indicated, the growth of filler tobacco for cheroots and the production of bright leaf for cigarettes, and experimental work on flue-curing is at present in progress.

Minor Food Crops.—Much greater attention is now being paid to the cultivation of minor food crops such as tapioca, groundnuts, and vegetables, and there appear to be considerable possibilities for extension of cultivation to meet local requirements. The Department of Agriculture, in a series of studies on tapioca cultivation, has reached the conclusion that this crop is no more exhausting to the soil than any other provided that adequate attention is paid to manuring and to soil conservation. There is one tapioca factory in Negri Sembilan.

There are 1,012 acres of groundnuts, mainly in Perak and Selangor, and trials have been carried out by the Department of Agriculture and distribution of planting material has been made. There appears to be considerable possibilities for extension of the cultivation of this crop to meet local requirements. There are three oil mills in the Federated Malay States.

There has been also a considerable increase in vegetable growing of recent years but imports are still very considerable. Vegetable growing is largely in Chinese hands and efforts are being made with a view to possible improvement of the conditions under which the vegetables are grown. A number of Europeans have now taken up land in the Highlands with a view to establishing a trade in fresh vegetables for the plains.

Increasing attention has been paid to fruit cultivation by small-holders and there are now 2,004 acres in the Jelebu District of Negri Sembilan planted with bananas as a sole crop.

2.—FORESTRY.

Of the land surface of the Federated Malay States 84.2 per cent. bears natural forest, 8.6 per cent. is devoted to rubber cultivation and the remaining 7.2 per cent. to agriculture and mining. In view of the growing tendency to limit the extent of cultivation of various intensively grown economic crops as a corrective to overproduction "the forest background" is likely to remain an important consideration in Malayan rural economy for an indefinite time to come. Realisation of the role of natural vegetation in preserving the fertility of tropical soils is rapidly spreading, and in the rubber industry there has been during the past three or four years a remarkable change-over from agricultural practice to a forestry technique which relies on the effect of indigenous "covers" to maintain the soil in good condition without cultivation or the application of fertilisers. Damage to forests by shifting cultivation, though not entirely negligible in the Federated Malay States, is generally under control: a more insidious form of fugitive land exploitation which has to be guarded against consists in clearing large areas of natural forest in order to grow an agricultural crop for a few years, without cultivation or manuring, until the soil is exhausted, whereupon the land is abandoned as waste. The areas of waste land due to mining activities are relatively insignificant. Conditions are generally favourable for a balanced economy under which all land not required for permanent agricultural use is kept under forest, productive as far as possible, but in any case protective of the soil.

The most important work of the Forest Department is the growing of timber, new crops being established concurrently with the exploitation of the original forests by the method known as natural regeneration: planting is rarely resorted to. All timber is sold standing, and the business of its conversion and extraction is carried on almost entirely by Chinese contractors and Chinese labour. The same applies generally to the collection of minor forest produce.

The Federated Malay States as a whole are self-supporting in the matter of timber supplies and were, on balance, exporters of timber and wood fuel to the value of \$456,052 in 1933. These exports were mainly to neighbouring Malayan territories, the Federated Malay States being seriously handicapped, in comparison with the rest of Malaya, as regards participation in overseas trade in forest produce by the high cost of transport to Singapore and Penang, the "arbitrary" hitherto imposed by the Straits Homeward Conference (but recently removed) on shipments from Port Swettenham, and the still higher freight rates on shipments from the outports. Additional factors adverse to the development of trade with the United Kingdom have been the depressed conditions and low prices ruling in the hardwood market coupled with a strong revival in local demand. Notwithstanding all difficulties several consignments of timber have been shipped and the efforts to develop this trade continues. There has been a marked increase in sawmilling activity in the Federated Malay States and, but for the factors mentioned, the prospects of establishing an export would be quite hopeful: as it is they are by no means to be despaired of.

At the end of the year there were 7,352 square miles of forest reserves and 53 square miles proposed for reservation. The areas reserved in the western states are as large as can be reasonably expected, but the reserves in the State of Pahang could be added to with advantage, the demand for land for cultivation by private enterprise, other than *padi* land, being now practically in abeyance.

3. ANIMAL HUSBANDRY.

There is a tendency to devote more attention to the development of the animal industry, but the chief difficulty is still an inadequate knowledge of the factors responsible for lack of development in the past. Good types of animals and birds of all species can be raised, but unfortunately these are out-numbered by those of poor quality, while owners have been discouraged in their efforts not only by the results obtained but also by occasional losses experienced by invasion with more fatal diseases. There is a lack of knowledge of the conditions obtaining in the country for the maintenance of animal health, and investigations are in progress on all aspects of this problem with a view to obtaining reliable data for information of stock owners.

Considerable attention has been paid to the question of buffalo breeding in Pahang with very satisfactory results. Development of the buffalo farm at Raub, Pahang, is proceeding and results of practical importance have been obtained. Stock shows for these animals, and also other animals and poultry have been instituted, and livestock owners are gradually showing a genuine interest in the work. Extension of these activities to other States is contemplated.

In addition to investigations on the possible utilization of local foodstuffs for stock, research is in progress to determine the mineral requirements of local stock. The existence of other specific disease conditions is also under investigation.

Pig breeding, as carried out by the Chinese, is proving very successful. No doubt improvements can be effected, but the fact that pigs of a type suitable for local markets can be bred in a country where milk and its by-products are not available indicates the use which can be made of local foodstuffs. The industry however is considerably checked by the prices paid, in some instances, for local foodstuffs.

Enormous numbers of poultry are reared but owners frequently receive setbacks in their work by invasion of a highly infectious virus disease of fowls which as yet can be controlled only by sanitary measures.

Dairying is conducted on rather haphazard lines, dairymen frequently endeavouring to make use of cattle which are obviously unsuited for the purpose. Good types of local dairy cattle, however, are available, and by paying attention to the selection of the right type and the feeding of the cattle, including the young stock, improvements can be effected. Similar observations apply to animals bred for slaughter.

The livestock census for 1933 showed the following distribution of stock.

					Buffaloes.	Cattle.	Sheep and Goats.	Pigs.	Horses
Perak	...	...	...	...	13,440	21,931	33,377	38,194	227
Selangor	...	...	...	...	2,527	11,769	20,205	59,966	52
Negri Sembilan	...	...	...	...	12,718	7,780	23,267	30,056	27
Pahang	...	...	...	...	18,289	4,654	16,967	13,972	55
Totals, 1933	...	...	...	...	46,974	46,134	93,816	142,188	361

The approximate value per head is: Buffaloes \$35, Cattle \$30, Sheep or Goats \$10, Swine \$15, and Horses \$500.

The imports of buffaloes, cattle, sheep and goats, and swine in 1933 were 7,874, 2,968, 8,068, 50,410 respectively, as compared with 2,198, 852, 12,294, 39,804 respectively for 1932.

The export of animals and animal products is negligible, being represented mostly by hides and skins.

4. MINERALS.

The Federation is, for its size, very richly endowed with minerals, owing their origin mainly to the granite, great outcrops of which occupy one-third of the Peninsula. The principal metals mined are tin, tungsten, gold and coal.

Tin.—About one-third of the world's supplies come from the Federated Malay States. Tin-ore there occurs as the mineral cassiterite (tin dioxide), and only very rarely have small quantities of stannite (sulphide of tin, copper, and iron) been detected with it.

The tin-ore was deposited in veins near the margins of granite-intrusions, both in the granite itself, and also in the intruded, heat-metamorphosed, bedded rocks, and large quantities have been mined in the Federated Malay States from such primary deposits, as, for example, at the Pahang Consolidated Company's Mine, one of the largest lode tin mines in the world. The amount of tin-ore so won from primary deposits in the Federated Malay States is larger than is generally realized, but the major part of the output comes from alluvium, the product of erosion of primary deposits.

The geographical distribution of the alluvial tin-fields of the Federated Malay States need not be described in detail. It is sufficient to say that these sources of mineral-wealth are in low-lying country near granite hills, and are bottomed usually by limestone or schist. Of late years important extensions of the known tin-fields have been proved in deeper ground, and it can be stated with confidence that considerable reserves of tin-ore are still available.

Ninety-nine per cent. of the tin is exported as tin-ore. Exports of ore (reduced to metallic content on a true assay basis) and block tin have been:—

				<i>Tons.</i>
1931	...	...	...	53,455
1932	...	...	...	28,363
1933	...	...	...	23,924

Since March, 1931, the export of tin has been restricted in accordance with the International Tin Scheme. On 27th October, 1933, a new Agreement for a period of three years from the 1st January, 1934, was signed by representatives of the following Governments.

Bolivia, the Malay States, the Netherlands East Indies, Nigeria and Siam.

The first four Governments are defined as "Signatories" in the Agreement, whereas the Government of Siam's status is a "participant". Since the signing of the agreement the following countries have joined the Scheme as participants: the United Kingdom, French Indo-China, Belgian Congo and Ruanda Urundi and Portugal.

The following table shows the quota percentages which have been in force since the inception of regulation. The discrepancy between the international and the domestic percentage is due to the domestic assessment being based on potential production, while the standard tonnage of 71,940 tons allotted to the Malay States by the International Tin Committee, is the amount of Malaya's output in 1929, the year adopted by the International Tin Committee as a basis for computing standard tonnages.

Table of Quota Percentages.

		<i>F.M.S.</i>		
		<i>International</i>	<i>Domestic</i>	
		<i>Percentage.</i>	<i>Percentage.</i>	
1931.	March-May ...	77.75	75	
	June-August ...	65.5	75	
	September-December ...	65.5	40	
1932.	January-May ...	56	40	
	June ...	44	33-1/3	
	July-December ...	33-1/3	25	} Byrne Scheme in operation.
1933.	January-March ...	33-1/3	25	
	April-June ...	33-1/3	23	
	July-December ...	33-1/3	25	
1934.	January-March ...	40+4	31	Special 4 per cent. allowance for one year from which F.M.S. over-production prior to 31.12.33 of 1,031 tons has to be deducted.
	April-September ...	50+4	37.5	
	October-December ...	40+4	30	

Assisted by the operations of an International Tin Pool, which held stocks off the market, the Scheme has been effective in raising the price of tin from £104 10s. (touched in April, 1932) to over £150 at the end of 1932. From June, 1933, until December, 1934, the price, with a few fluctuations, remained very steady between £225 and £230 a ton. On the 10th July, 1934, an Agreement was signed by the four Signatory Governments to the International Tin Control Scheme to form a buffer stock of tin to be used as an adjunct to the International Tin Control Scheme. Malaya's contribution to the stock is 3,597 tons of tin. The industry is in the hands of large European Companies and Chinese in the approximate ratio of 66 per cent. to 34 per cent. respectively.

Tungsten ores.—Wolfram and scheelite are ores of tungsten which also owe their existence to the intrusion of the granite masses. When prices were higher, wolfram was exported in large quantities from Perak and Negri Sembilan, and scheelite was mined in Selangor and Perak. Recent geological investigations of a particular scheelite deposit at Pulai in Perak, confirmed later by prospecting, has shown the occurrence to be unique. It is probably the most important deposit of scheelite in the world.

Exports have been:—

<i>Year.</i>				<i>Wolfram.</i>	<i>Scheelite.</i>
				<i>Tons.</i>	<i>Tons.</i>
1929	...	...	...	44	280
1930	...	...	...	65	784
1931	...	...	...	—	368
1932	...	...	...	—	302
1933	...	...	...	33	918

Gold.—Some 30,000 oz. per annum are produced from a number of gold mines. The most important single mine, owned by the Raub-Australian Gold Mining Co., Ltd., produced 26,358 oz. in 1933; this is mined from quartz lodes in slate near to an outcrop of a special type of granite. In the last few years prospectors have made an intensive search for new deposits but only small occurrences of payable alluvium have been located.

Production during recent years has been as follows:—

Year.	Production. oz.	Value. £
1929	26,782	113,743
1930	29,597	125,698
1931	29,462	141,112
1932	29,296	135,617
1933	29,036	169,498

Coal is mined in Batu Arang, Selangor, by Malayan Collieries, Ltd. Almost the whole production is consumed locally, principally by the Federated Malay States Railways and by the mining industry, and exports are negligible (253 tons in 1931, 272 tons in 1932 and nil in 1933). The quantity produced therefore depends on the degree of local industrial activity and has recently tended to decline.

Production during recent years has been as follows:—

	Tons.		Tons.
1929	661,514	1932	277,848
1930	565,573	1933	218,247
1931	402,355		

Other minerals.—*Arsenic* occurs as *arsenopyrites*, sometimes associated with primary deposits of cassiterite, but the price of the mineral is not usually high enough to pay for production, except as a side-line to tin-mining. *Pyrites* is widespread, but there is no known deposit in the Federated Malay States large enough for the manufacture of sulphuric acid. *Copper-ores* have been worked on a small scale in the tin-bearing areas. *Galena* (*lead sulphide*) occurs in limestone country, sometimes associated with *sphalerite* (*zinc sulphide*), but prospecting has not yet been proved either to be present in economic amounts.

Monazite is a mineral commonly found in tin-ore concentrates. It contains, in varying quantities, the *thorium* used in making gas-mantles but so far no market has been obtained for it. *Corundum* is found as boulders in the Kinta District. It has been tried locally as an abrasive, and in place of bort in a rock-drill. Lately it has found another use in ball mills.

Ilmenite is available in large amounts in the Federated Malay States. While it is in some demand in other countries, none of the mineral has yet been exported from Malaya, except for a small shipment to Japan. *Zircon*, too, is a common mineral which may be put to commercial use, but it has not yet found a sale in Malaya. Several deposits of *iron ore* are known in the Federated Malay States.

Geological investigation has shown that it is extremely improbable that *petroleum* will ever be produced in the Federated Malay States in payable quantity.

Phosphate of recent formation, found in limestone caves, is used locally as a manure. *Manganese oxides* have been seen in tin mines in Kinta, but not in deposits of economic importance. *Bauxite*, too, is known to occur but only in small amounts.

Apart from its value as having been the source of most of the minerals, *granite* is used widely as road-metal, as railway ballast, and, to a much smaller extent, for building. *Marble* is worked at Ipoh, and *crystalline limestone* is common in many localities, being quarried for road-metal and railway ballast. It is also a source of lime. A series of ancient indurated volcanic rocks provides excellent road-metal and railway ballast in parts of Pahang.

Large reefs of *quartz* in Selangor and Negri Sembilan may prove useful for glass-making. *Kaolin* is abundant at the edge of the granite intrusions, and is also formed by the weathering of felspar in granite. Bricks are manufactured from alluvial clays and from various weathered rocks, including shale and granite.

5. FISHERIES.

The Malay Peninsula is situated in a large area of shallow sea. On the west coast the Straits of Malacca are nowhere deeper than fifty fathoms, while it is only at a distance of over 250 miles from the east coast that the floor of the China Sea dips to a depth at which it is unprofitable to fish. Only the fringe of this vast area is fished at present. The fisheries are conducted in shallow undecked boats, propelled by paddles or oars. Sail is used in proceeding to and from fishing grounds, but oars or paddles are always employed in manoeuvring the fishing gear. The grounds fished, consequently, are rarely more than twenty miles distant from the mainland.

With craft of this nature the monsoons exert a dominant influence. The east coast lies open to the full force of the north-east monsoon, and fishing there ceases with its advent. While in parts the effect of this monsoon is felt for a shorter period, fishing ceases in the main from about November to April. With suitable harbours and decked craft employing power, there would be no more difficulty in carrying on an all year fishery than is experienced in the North Sea. The east coast of the Peninsula is less favoured by nature with natural harbours than the east coast of Great Britain. A natural harbour, however, exists at Port Blair, Johore, and a possible one, deserving investigation, opposite Pulau Kapas in Trengganu. A number of islands also possess protected anchorage.

The total weight of wet fish landed in 1933 in the Federated Malay States amounted to not less than 28,591 tons. Estimated at 5 cents per *kati* (equivalent to 1½ lb.) the value of fish landed in the Federated Malay States amounted to \$2,401,644 (£280,192).

Over half of this was landed in Selangor, and rather under a quarter each in Perak and Pahang. The amount landed in Negri Sembilan was only a little more than 300 tons.

All these fish were caught by native methods, either in traps, drift nets, seine nets or by hook or line, and were mostly salted and dried in the sun for local consumption. A considerable proportion was sold fresh and was distributed all over Malaya packed in ice, either for immediate consumption or if unsold as such, for conversion into salt fish, which is consumed in large quantities and also exported from the Straits Settlements.

The total weight of wet fish landed in 1933 was an increase of 2,421 tons over 1932. The increase was largely due to the increased number of fishermen employed.

The total full-time fishermen employed amounted to 10,179 of whom 5,644 were Malays and 4,528 Chinese. A considerable number of Malays who were only partially employed in fishing are not included in these figures.

B.

FOOD SUPPLY.

The Federated Malay States are not self-supporting in food-stuffs. So long as there was a satisfactory market price for rubber and tin it was possible to purchase supplies of rice and other food-stuffs on more favourable terms than they could be produced in Malaya. From one-quarter to one-third of the total consumption of rice was grown locally, the rest being imported chiefly from Siam and Burma.

The trade depression of the last few years, however, has rendered the export staples less and less profitable, and has brought about an increase in the local production of food-stuffs.

Exact figures of local production of food-stuffs, other than rice, are not available, but the increase in production is reflected to some extent in the fall in imports of all kinds of food-stuffs.

The Government desires to make the country more self-supporting. A Drainage and Irrigation Department has been formed to improve existing rice land and to bring new areas into rice cultivation. The Agricultural Department has stimulated the growing of tea by its successful production of the lowlands variety, and is still experimenting with the highlands variety. Coffee-growing has been extended and several brands of Malayan coffee are now being marketed. An expert has been appointed to give instruction in improved methods of poultry breeding, and the Agricultural Department is establishing poultry runs with the object of distributing birds of improved strains for crossing with kampung poultry.

While it is probably not physically impossible to make the Federated Malay States almost, if not entirely, self-supporting, it is certain that for very many years to come the rubber and tin industries must continue to occupy the predominant position in the economic life of the community and consequently large quantities of food-stuffs must continue to be imported.

VI.—Industry.

The following forms the bulk of the few manufacturing concerns in the Federated Malay States:—

Nature of activity.	No.	Labour Force.					
		Indians.		Chinese.		Other.	
		M.	F.	M.	F.	M.	F.
Engineering works and motor repairs ...	2	5	—	39	—	—	—
Aerated Water Factories ...	3	14	1	10	39	—	—
Cement works ...	1	273	98	11	—	8	—
Ice works ...	1	5	—	6	—	3	—
Plywood factory ...	1	41	—	58	—	29	—
Rubber works ...	2	18	—	71	30	19	—
Oil mills ...	2	53	—	4	—	9	—
Pineapple packing factory ...	1	—	—	250	30	3	—
Match factory ...	1	21	2	28	129	34	1
Nipah distillery ...	1	110	—	29	—	70	—
Rice mills ...	2	88	13	3	—	—	—
Samsu distilleries ...	2	(Information not yet available—probably small.)					

There are fairly considerable native Malay industries in various parts of the Federation, individual industries often being localized in particular places. The most important are the following:—mat-making, embroidery, weaving and dyeing, basketry, and pottery. Some of these industries are now moribund and none of their products enter to any substantial extent into the export market.

Many handicrafts are carried on by the Chinese and Indians, for example boot-making, tailoring, metal-working, and so on.

VII.—Other Economic Activities.

The greater part of Federated Malay States trade passes through the Straits Settlements ports of Singapore and Penang, and the Federated Malay States cannot be said to have any entrepôt trade.

Tourist traffic is negligible. Tourist ships do not touch at Federated Malay States ports, of which only Port Swettenham can take ocean-going vessels. Occasionally passengers disembark at Penang and make the journey through the Peninsula by rail or road, rejoining their ship at Singapore.

VIII.—Communications.

RAILWAYS.

The Federated Malay States Government owns the railways both in the Federated Malay States and in the Straits Settlements and the Unfederated States of Kedah, Perlis, and Kelantan. It has leased the Johore State Railway (121 miles), extending from Johore Bahru at the southern extremity of the Peninsula opposite Singapore Island, to Gemas on the boundary between Johore and the Federated Malay States. A causeway carrying the railway and a roadway cross the Johore Straits connects the Island of Singapore with the mainland. At Gemas the line branches into the West Coast and the East Coast Lines.

The West Coast Line runs north-north-west through Negri Sembilan, Malacca, Selangor, Perak, and Province Wellesley to Prai—the port opposite Penang Harbour about 488 miles from Singapore; thence through the Unfederated States of Kedah and Perlis to the Siamese frontier station of Padang Besar, 580 miles from Singapore. Through traffic with the Royal State Railways of Siam was opened on the 1st July, 1918, the distance between Singapore and Bangkok being 1,195 miles.

The East Coast Line, completed in 1931, proceeds northwards from Gemas through Negri Sembilan, Pahang, and Kelantan terminating at the port of Tumpat, 328 miles from Gemas. It provides an alternative route to Siam from Singapore, by a short branch from Pasir Mas in Kelantan to the Golok River at the Siamese boundary, where it joins the Siamese Line running to Haad Yai Junction, 145 miles distant, the junction for the main Bangkok-Penang-Singapore Line.

The total length of line (first track) now open to traffic under the Federated Malay States Railway Administration is 1,067 miles. The line is of metre gauge, and is mostly single track.

The day and night mail trains running between Singapore and Prai (for Penang) are provided with restaurant or buffet parlour cars and sleeping saloons.

The Central Workshops near Kuala Lumpur are fully equipped with modern machinery. They manufacture the rolling stock, erect the locomotives, usually manufactured in England, and carry out all maintenance and repair work. At Ipoh and Kuala Lumpur there are large and up-to-date railway hotels adjoining the stations. A through express service exists between Penang and Bangkok. Bangkok is within twenty-six hours of Penang and within fifty-two hours of Singapore.

ROADS.

The total mileage of roads on 31st December, 1933, was 2,863 miles of which 1,871 miles or 65·4 per cent. are bituminously treated.

In addition to metalled roads 150 miles 39 chains of unmetalled roads and 1,535 miles 34 chains of bridle-paths are maintained by the Government.

Transportation on the roads is mainly by motor traction. The number of bullock-carts has decreased considerably during the last few years.

SHIPPING.

The principal communications with the rest of the world are via Singapore or Penang, whence there are frequent sailings to most of the important ports of the World.

The only port in the Federated Malay States for ocean-going vessels, Port Swettenham, is situated about 30 miles from Kuala Lumpur, at the mouth of the Klang River. The harbour is completely landlocked, and there is a minimum depth of 22 feet over the bar at the southern entrance (the average rise of tide being 15 feet at springs and 9 feet at neaps) and of 32 feet in the anchorage.

There is one wharf 1,000 feet long with 33 feet minimum depth of water, three T-headed wharves, each 100 feet long, with 15 feet of water, and a pontoon wharf 200 feet long, with 16 feet minimum depth of water. Ample storage space is provided in the Federated Malay States Railway godowns.

Other ports (for coasting trade only) are Teluk Anson, Port Weld, Kuala Kurau, and Sitiawan in Perak; Kuala Selangor in Selangor; Port Dickson in Negri Sembilan; and Pekan and Kuantan in Pahang.

The only navigable rivers of any importance in the country are the Perak and the Pahang, and even these are used only by launches and small native craft.

The following principal steamship lines maintain regular services calling at Port Swettenham:—

Europe:

British.—Blue Funnel (Ocean Steamship Company and China Mutual Steam Navigation Company, Limited), Ben, Ellerman and Bucknall, Glen and Shire, and Peninsular and Oriental Steam Navigation Company, Limited.

German.—Hamburg Amerika Linie and Norddeutscher Lloyd.

Scandinavian.—East Asiatic Co., and Swedish East Asiatic Co.

India:

Bombay.—Peninsular and Oriental Steam Navigation Co.

Calcutta.—British India Steam Navigation Co.

Madras.—British India Steam Navigation Co.

Burma.—British India Steam Navigation Co., and Straits Steamship Company, Limited.

China and Japan.—Blue Funnel (Ocean Steamship Company and China Mutual Steam Navigation Company, Limited), Ben, Ellerman and Bucknall, Glen and Shire and Peninsular and Oriental Steam Navigation Company, Limited.

Canada and United States of America.—Frequent cargo services to New York via Suez, including Blue Funnel, Ellerman, Prince and others.

Local Services.

In addition there are various Chinese steamship companies.

The following table shows the nationality, number, and tonnage of ocean-going steamers entered at Port Swettenham during 1933:—

Nationality.	Entered.	
	No.	Tonnage.
British	570	1,981,483
Dutch	94	163,257
German	36	160,824
Japanese	36	142,947
Danish	33	120,951
Other	76	109,845
Total	845	2,679,307

The largest vessel entering the port was s.s. *Philoctetes* (British) of 11,431 tons. The deepest draft vessel entering the port was s.s. *Menelaus* (British) drawing 31 feet 8 inches of water.

AIR.

There are as yet no direct air communications. The Dutch Air Mail Amsterdam-Batavia passes over the Federated Malay States between Alor Star and Singapore, and mail for despatch by it is sent by rail to Singapore. The most important development during 1933 was the extension in December of the Imperial Airways London/Karachi service to Alor Star and Singapore.

The Imperial Airways and the Netherlands Air services now provide between them a twice-weekly, rapid, regular and reliable air mail; the usual time in transit between London and Singapore being between 8 and 9 days.

IX.—Tariff.

Import duties are levied only on imports specifically named in the tariff, of which the most important are alcoholic liquors, tobacco, petroleum, sugar, tea, coffee, edible oils and fats, matches, textiles, apparel and cement (all subject to various specific duties) and a number of manufactured articles (subject to *ad valorem* duties varying from 10 per cent. to 50 per cent. on foreign goods and 2½ to 25 per cent. on Empire goods). Alternative specific and *ad valorem* duties on cotton textiles are provided.

Imperial Preference is granted on a number of articles, including wines and beer, manufactured tobacco, sugar, cement, cotton textiles, and other manufactures. The margin of preference varies but, in the case of *ad valorem* duties, is not less than 10 per cent. *ad valorem*.

X.—Trade Representatives.

The Malayan Information Agency, which maintains an office at Malaya House, 57, Charing Cross, London, S.W.1., was originally established by the Government of the Federated Malay States, but its upkeep is now shared by the Government of the Straits Settlements, and the Agency's functions cover Malaya generally. Its primary object is to advertise the products and attractions of Malaya, to furnish to inquirers information as to the opportunities which the country provides for investment and the facilities for travel and exploration which it affords to the tourist or traveller, and to supply (on payment) publications and maps.

The Agency is under the direction of a Board, consisting of the Agent, a Deputy Agent, a representative of mining interests, a representative of planting interests, a representative of commercial interests, and a retired senior member of the Malayan Civil Service.

The Senior Deputy Commissioner of Trade and Customs, Federated Malay States, holds the honorary appointment of Imperial Trade Correspondent at Kuala Lumpur.

One of His Majesty's Trade Commissioners, responsible to the Department of Overseas Trade, is stationed at Singapore and the Federated Malay States are included in his sphere.

JOHORE.*I.—Situation, etc.*

Johore is a Malay State under British protection lying at the extreme south of the Malay Peninsula. It is bounded on the north by Malacca, Negri Sembilan, and Pahang, on the west by the Straits of Malacca, on the south by the Straits of Tebrau, and on the east by the China Sea. A causeway, carrying the peninsula road and railway, spans the Straits of Tebrau to connect Johore Bahru with Singapore Island.

Johore is in the main a lowland area lying to the south of the principal mountain ranges of the Malay Peninsula and is much less hilly than any other State of British Malaya. It is still very largely covered by primeval equatorial forest; the only thickly settled areas are on the south-western coast and around Johore Bahru, the capital, and the north-eastern half of the State is still practically undeveloped.

Its climate approximates to that of Singapore and the Federated Malay States. The highest annual rainfall recorded at any station in 1933 was 199.16 inches, the lowest 52.66 inches. The highest maximum temperature in 1933 was 97° F. and the lowest minimum 64° F.

The total area of the State is approximately 7,500 square miles and of it, 1,220,935 acres are alienated. Land is held from the Sultan in perpetuity upon payment of annual quit-rent.

II.—Population.

The population recorded at the census of 1931 and the estimated population at the 31st December, 1933, was:—

	1931 Census.	1933 Estimate.
Malaysians*	234,422	268,806
Chinese	215,076	246,873
Indians	51,038	58,783
Europeans	722	833
Others	4,053	4,725
	<u>505,311</u>	<u>580,020</u>

There is a marked excess of males, due to immigration, and at the 1931 Census the proportion of females per 1,000 males was 562. 16·4 per cent. of the population was urban (i.e., in towns of 1,000 inhabitants or more). There are three towns of some size, Johore Bahru (21,777), Bandar Maharani (20,339), and Bandar Penggaram (13,329).

The occupied population was classified industrially at the last Census as follows:—

Agriculture	163,403
Fishing	5,136
Mining and manufactures	13,183
Transport and commerce	22,365
Public service and professions	5,806
Personal service	13,445
Total occupied population	<u>223,338</u>

The indigenous Malay population is mainly engaged in agriculture and fisheries. The immigrant Malaysians and Indians are mainly employed on estates. The Chinese, while also supplying many agricultural and general labourers, supply practically all the mining workers and predominate in trading.

As will be seen from the figures of race, immigration, principally of Chinese, Indians, and Javanese, is of great importance in Johore, indigenous Malays forming less than one-quarter of the population, and the proportion of the population born in Malaya being in 1931 only 43·4 per cent. Most of the immigrants stay in Malaya only a few years and there is a constant ebb and flow through Singapore. No statistics of arrivals in and departure from Johore are kept, but during the decade 1921-1931 the Chinese population increased by 117,823, and Indian by 26,858.

III.—Finance.

A.

CURRENCY AND BANKING.

The currency in circulation is that of the Straits Settlements (\$1 Straits = 2s. 4d.). The Hong Kong and Shanghai Banking Corporation has branches at Johore Bahru and Muar, the Ho Hong Bank, Limited (head office, Singapore) has branches at Muar and Batu Pahat, and the Batu Pahat Bank Ltd., also operates at Batu Pahat. The Government has no interest in any banks and conducts no operations of a banking nature.

B.

PUBLIC FINANCE.

1. Johore has no public debt.

2. (A). Revenue (on basis of 1934 Estimates).

Self-balancing Department.

	Revenue.	Expenditure.	Balance.
	\$	\$	\$
Posts and Telegraphs	246,780	402,706	—155,926
	<u>Deficit \$155,926</u>		

General Revenue.

	\$	Percentage.
I. Land and Forest Revenue	2,310,324	23·4
II. Customs and Marine, i.e.—		
Export Duties	679,100	
Import „	1,782,100	
Other	30,110	
	<u>2,491,310</u>	25·2
III. Opium Revenue	1,700,000	17·2
IV. Excise, Licences, and other internal revenue	558,423	5·7
V. Fees of Court and miscellaneous revenue	183,224	1·9
VI. Interest	1,445,000	14·6
VII. Municipal	944,805	9·6
VIII. Land Sales	241,000	2·4
	<u>9,874,086</u>	<u>100</u>
Equivalent to £1,151,977.		
Revenue of self-balancing Department set off against Expenditure	246,780	
	<u>10,120,866</u>	

* Malaysians include immigrants of Malay race from the Netherlands East Indies, principally Javanese, 90,735

(B) *Analysis of Import Duties for 1933.*

No information is available as to the source of the imports from which Customs revenue was obtained. In 1933 the principal classes of imports from which revenue was received were:—

	\$
Tobacco...	882,710
Spirits ...	242,807
Groundnuts and Gingelly Oil ...	55,139
Petroleum ...	816,113
Cotton Piece Goods ...	100,489
Matches ...	37,439
Other articles ...	88,955
	2,223,652

3. *Expenditure (on basis of 1934 Estimates).*

	\$	Percentage.
I. Deficit on self-balancing Department ...	155,926	1.2
II. Public Debt ...	—	—
III. Administration ...	5,718,456	43.6
IV. Economic Development ...	2,482,072	18.9
V. Social Services, i.e.—	\$	
Education Department ...	782,903	
Medical ... 1,063,189		
Other ... 1,850,149		
	3,696,241	28.1
VI. Defence ...	515,230	3.9
VII. Pensions, Gratuities, and Allowances ...	558,474	4.3
	13,126,399	100
Equivalent to £1,531,413.		
Expenditure of self-balancing Department set off against Revenue ...	246,780	
	£13,373,179	

4. *Reserve Funds, etc.*

At the end of 1933, the Johore Government had an Opium Revenue Replacement Fund of \$15,038,543 (equivalent to £1,754,496 and intended to be used in the event of the disappearance of the opium revenue owing to the suppression of opium smoking in the State). There were also investments on account of general surplus funds amounting to \$20,836,135 (equivalent to £2,430,882).

5. No grants-in-aid or loans-in-aid have ever been asked for or received.

IV.—*Trade Statistics.*

Full trade statistics are not available. The trade of Johore with non-Malayan countries is included in the statistics for British Malaya—see memorandum on the Straits Settlements.

EXPORTS.

(i) *Total Exports (including Bullion and Specie).*

	\$	£
1913 ...	14,212,850	equivalent to 1,658,166
1930 ...	59,714,461	6,966,687
1931 ...	34,995,441	4,082,801
1932 ...	29,623,457	3,456,070
1933 ...	35,985,800	4,198,343

(ii) *Exports by Classes, 1933.*

Class	\$	£
Class I ...	6,913,556	equivalent to 806,582
" II ...	29,046,399	3,388,746
" III ...	—	—
" IV ...	25,845	3,015
	35,985,800	4,198,343

(iii) *Principal Domestic Exports 1933.*

Article	Quantity	Value in \$	Value in £
<i>Class I.</i>			
Preserved Pineapples ...	946,680 cases	3,193,851	372,616
Tapioca ...	239,988 cwt.	681,373	79,494
Pineapples (fresh) ...	26,430,800	664,468	77,521
Arecanuts ...	295,293 cwt.	542,169	63,253
Swine ...	11,795	328,768	38,356
Eggs ...	9,328,295	123,930	14,458
<i>Class II.</i>			
Rubber ...	96,796 tons	22,622,970	2,639,346
Copra ...	4,840 tons	3,193,515	372,577
Iron-ore ...	408,644 tons	2,043,220	238,376
Timber ...	32,790 tons	406,373	47,410
Tin-ore ...	306 tons	364,173	42,487
Gambier ...	14,083 cwt.	76,980	8,981

It is not possible to give the countries of destination of all the exports. Iron-ore is carried direct to Japan, and food-stuffs such as sweet potatoes, fruit, eggs, and poultry are sold in Singapore but most of the exports are shipped to other countries from Singapore.

IMPORTS.

(i) *Total imports (including Bullion and Specie).*

					\$	£
1913	...	...	...	...	9,304,509	equivalent to 1,085,526
1930	...	...	...	...	48,071,047	" 5,603,239
1931	...	...	...	...	29,449,254	" 3,435,746
1932	...	...	...	...	21,809,020	" 2,544,385
1933	...	...	...	...	22,561,488	" 2,632,173

(ii) *Imports by Classes, 1933.*

Class					\$	£
I	...	...	...	...	11,566,195	equivalent to 1,349,389
" II	...	...	...	...	813,740	" 94,936
" III	...	...	...	...	10,113,803	" 1,179,944
" IV (Parcel Post)	...	...	...	...	67,750	" 7,904

Details of the principal imports during 1933 are not available, nor is it possible to give the countries of origin.

V.—Natural Resources.

A.

1. AGRICULTURE.

Agriculture occupies the position of chief importance in the economy of Johore. Agricultural holdings vary in size from the small-holding of one or two acres to large and highly organized estates of up to 25,000 acres. Production may be either by estates, by small-holders growing crops for sale, or by small-holders growing crops for their own consumption. A considerable proportion of the aggregate production is of the last type, especially food-stuffs, but the crops grown primarily for export will be dealt with first. On many holdings where rubber or coconuts are the main crops, subsidiary crops are grown such as pineapples, tapioca, and bananas.

Rubber is the most important product and is grown both on large estates owned by Europeans or Asiatics and on small-holdings cultivated by Asiatics. The labourers employed on the former are usually Indian, Chinese and Javanese. It is estimated that the number of labourers employed in rubber cultivation is over 100,000. Rubber is grown exclusively for export and for many years the value of such exports far outweighed that of the total sum of all others. In reviewing exports during recent years such values represented about 75 per cent., 84 per cent., 74 per cent., 66 per cent. and 54 per cent., of the total value of Agricultural exports for the years 1928, 1929, 1930, 1931, and 1932 respectively. In 1933 rubber again presented just two-thirds of the total value of agricultural exports, an improvement in the price of the commodity being recorded from May until the end of the year.

The total area alienated for rubber was returned at 1,003,684 acres in 1933 of which 854,373 acres were planted. Of the total planted area 647,474 acres were tappable. The area under Estate rubber at the end of 1933 was 455,952 acres, and under Smallholding rubber, 398,421 acres. Within recent years considerable interest has been evinced in the bud-grafting of rubber and at the end of 1933 55,267 acres of young rubber had been so treated. Only a small proportion of the areas bud-grafted have yet reached maturity.

During the last few years considerable areas have been out of production, many estates resorting to tapping their higher yielding areas only the remainder of the estate being put on a care and maintenance basis. Small-holders in some parts of the State have temporarily abandoned tapping, and turned their attention to the production of food-stuffs. The prevailing low price of rubber has led to less attention being paid to the treatment and control of mouldy rot, the most prevalent disease of rubber.

Coconuts.—The total area under coconuts is estimated at about 200,000 acres. Only a small percentage of the coconuts are on large estates, the cultivation of coconuts being almost entirely confined to small-holders, and often interplanted with arecanuts, fruit or coffee. Cultivation has progressed steadily in recent years and the exports of copra in 1933 amounted to 48,397 tons valued at \$3,193,515, as against 41,817 tons valued at \$3,831,355 in 1932. The value of the exports shows a considerable decline over that of 1932 notwithstanding that net exports of the product increased by 15.7 per cent. The continued fall in the price of copra has placed the industry in a precarious position, and much hardship has been experienced by small-holders entirely dependent on coconut cultivation for their livelihood. The present price position is the result of a combination of factors affecting a number of related industries and not of circumstances solely inherent in the coconut industry. There is room for considerable improvement in the quality of the copra produced by small-holders and steps are being taken to demonstrate improved methods of preparation, and the use of better type kilns. Only a small percentage of exports reach the fair merchantable sun dried standard, the bulk of exports being of the fair merchantable grade. There is no important trade in coconut products other than copra.

Arecanuts.—The area under arecanuts in 1933 was estimated at 39,225 acres, of which only 4,523 acres were planted in pure stands, the remainder being under mixed cultivation with coconuts, coffee and fruit. Exports for 1933 were 14,765 tons valued at \$542,169 as compared to 14,359 tons valued at \$847,664 in 1932. Prices fell so low that towards the end of the year ripe fruit was being left unharvested, it being unremunerative to collect it. The preparation of split or sliced and dried arecanuts has been under investigation during the year, and it has been found that improvement is needed in methods both of preparation and of marketing.

Pineapples.—The total area under pineapple cultivation as a sole crop and as a catch crop during 1933, was estimated at 42,800 acres of which approximately 10,000 acres were grown as a sole crop. With the cessation of alienation of land for rubber planting, greater interest is being shown by pineapple cultivators in the cultivation of this fruit as a sole crop, and the practice of regarding it as a catch crop of young rubber is being abandoned. The fruit is grown chiefly for canning. Eight canning factories were operating during 1933 employing a total staff of approximately 2,000 people. The number of women employed does not exceed 100. The export of preserved pines for the year was 946,680 cases as against 1,117,258 cases for 1932. The export of fresh fruit, mainly to Singapore for canning purposes, was 26,430,800 as against 35,767,339 in 1932. The total value of pineapple exports in 1933 was \$3,854,621 as against \$4,414,796 in 1932. Malayan canned pineapples form a considerable proportion of World supplies and, being inferior to the Hawaiian variety, do not compete in the markets with the latter variety, as they are considerably cheaper and cater for the requirements of a different class of consumer. Experimental work on the grading of pineapples was commenced during 1933, and provisional grading standards were drawn up with a view to their adoption by the trade.

Tapioca is cultivated almost exclusively as a catch crop with young rubber and is entirely in Chinese hands. The acreage planted as a sole crop during 1933 was 600 acres, while 11,455 acres were cultivated as a catch crop. There was a decline in production during the year from 13,723 tons in 1932 to 11,999 tons, due to the maturing of the rubber areas in which it had been previously cultivated as a catch crop.

Twelve factories were operating during the year, the total number of employees being approximately 500.

Oil Palms.—The oil palm industry is entirely an estate industry. The total area under this crop at the end of 1933 was 30,067 acres. Of the six oil palm estates in the State, only two were producing during the year. 3,703 tons of pericarp oil and 695.8 tons of kernels were produced during 1933. Production for 1932 was 1,513 tons of oil and 181 tons of kernels. The basic economic factors which apply to the oil palm industry are similar to those which relate to the coconut industry, so that the depression through which coconut producers have been passing recently, has affected the oil palm industry in much the same manner.

Coffee.—Two varieties of coffee are commonly grown, namely, *Robusta* and *Liberica*. At the end of 1933, 366 acres were planted with coffee as a sole crop and 6,597 acres with coffee under mixed cultivation. Exports for 1933 amounted to 112 tons of a total value of \$28,171 compared with 174 tons of a value of \$39,498 in 1932.

Tuba or Derris.—The interest taken in this crop is declining. Whereas the area in 1932 was 1,820 acres, only 1,104 acres were cultivated in 1933. Tuba is usually cultivated as a catch crop of rubber and sometimes of oil palms. Many estates and smallholdings on which this crop was extensively grown in the past, have given up cultivation owing to the unremunerative return received for the root, and to the ravages of a beetle pest *Graniotectus corbetti* Laboiss.

Patchouli.—This crop, covering about 1,468 acres, is grown exclusively by Chinese. The crop is cultivated for the oil, distillation of which is carried on at Singapore and Penang, whither the dried leaves are exported from Johore.

Other export crops.—There is a large production of miscellaneous *fruits* (particularly durians, mangosteens, rambutans, chikus, dukus and bananas) for sale in Singapore. Only very small areas of orchard are cultivated, but it is estimated that there are between 8,000 and 9,000 acres of mixed fruit cultivation. *Tobacco* is cultivated by small-holders, but the area under this crop varies greatly according to the price of leaf. It is estimated that 1,370 acres were cultivated in 1932, but only 740 acres in 1933. The curing and drying present difficulty to most cultivators.

Details of the principal agricultural exports during the past five years are as follows:—

Rubber.				Copra.				Arecanuts.			
	Tons.	\$		Tons.	\$			Tons.	\$		
1929	89,295	68,588,922		35,349	5,564,997			13,527	1,644,360		
1930	90,643	39,259,867		38,711	5,183,037			12,910	1,328,773		
1931	90,780	20,319,138		38,428	3,321,228			13,744	802,313		
1932	86,685	13,902,311		41,817	3,831,355			14,359	847,664		
1933	96,796	22,622,970		48,398	3,193,515			14,765	542,169		

Pineapples.				Preserved Pineapples.				Tapioca.				Coffee.				Other Agricultural Produce.			
Nos.	\$	Cases.	\$	Tons.	\$	Tons.	\$	Tons.	\$	Tons.	\$	Tons.	\$	Tons.	\$	Tons.	\$	Tons.	\$
27,275,908	561,933	1,182,609	4,730,436	11,089	616,036	87	62,328	856,080											
19,088,301	477,212	1,310,939	5,057,589	15,313	803,020	117	69,532	471,457											
48,170,165	1,204,252	838,101	3,024,122	14,803	746,085	162	55,762	431,820											
35,767,339	894,184	1,117,258	3,520,612	13,723	785,784	174	39,498	1,305,339											
26,430,800	664,468	946,680	3,193,851	11,999	681,373	112	28,171	991,453											

Food crops.

(i) **Rice.**—Largely, no doubt owing to the depression in other crops, the area under padi has been increasing, as shown by the following figures.

Season.	Wet padi.	Dry padi.
	Acres.	Acres.
1929-30	5,342	5,137
1930-31	7,293	7,375
1931-32	10,885	8,411
1932-33	15,800	9,260

An active interest has been taken in the development of this crop by the Agricultural Department, which has examined potential padi areas and maintains a staff of padi inspectors. Special training in padi cultivation has been given to Asiatic officers of the Department who are to act as agricultural instructors.

(ii) **Other food crops.**—There are a large number of food crops grown extensively for local supply, either for consumption by the grower or for sale. These include sweet potatoes, yams, pumpkins, green vegetables, maize, ginger, chillies, groundnuts, and fruits. Some of these are potential export crops but there is at present no export trade in them.

2. FOREST PRODUCTS.

There are extensive forests in Johore, of which 1,094 square miles (or 15 per cent. of the total area of the State) have been constituted Forest Reserves. Further areas amounting to 230 square miles have been notified pending reservation. Most of the forests lie on the eastern side of the State at a considerable distance from the main centres of population. Of the total area of reserved forest, 1,041 square miles are inland and the balance of 53 square miles are mangroves. The principal products are timber, firewood, charcoal, canes, resins and wild rubber.

Timber.—The most important woods are the semi-hard *Dryobalanops aromatica* known locally as *kapur*, the hard *Shorea materialis* or *balau*, the semi-hard *Dipterocarpus* or *Keruing* which is identical with the *gurjun* of Burma and the *hora* of Ceylon, and the useful soft timbers produced by a number of species of *shorea* known locally as *meranti*. Second in importance are the hard timber produced by *Balanocarpus Heimii* or *chengal* and the various species of *Hopea* and *Vatica* known collectively as *resak*. All these woods are well known and command a ready sale but there are also various lesser known woods which, as soon as their properties are more generally appreciated, should prove serviceable for a variety of purposes. Amongst these may be mentioned *Koompassia malaccensis* locally known as *kempas* which produces a hard and strong timber, eminently suitable for heavy construction but only after impregnation. Most of the timber cut within the State is exported. Soft woods are imported on a large scale by the pineapple manufacturers for use as packing cases but normally exports exceed imports. Figures of production and export during the last 5 years are as follows:—

				Timber produced. Tons.	Timber exported. Tons.	Percentage exported.
1929	...	...	...	47,126	23,592	50.0
1930	...	...	...	47,056	34,116	72.6
1931	...	...	...	39,913	28,832	72.2
1932	...	...	...	36,663	24,286	66.0
1933	...	...	...	52,231	32,915	63.0

There is a flourishing sawmill industry in Singapore financed by the Chinese and to this may be attributed the high state of development of Johore's timber trade. There are two sawmills in the State but most of the timber is exported in the form of logs to Singapore whence it is re-exported, after conversion, to India, China, Aden, Zanzibar and Mauritius. Under the stimulus of Imperial Preference, efforts attended by a certain measure of success, are being made to establish an export trade with the United Kingdom. The timbers concerned are *kapur*, *keruing* and *meranti* of which 217 tons were exported to England in 1933. Large quantities of timber are imported to Singapore from the neighbouring Dutch territory but, owing to the conservative forest policy adopted in Johore, there is reason to expect that a higher proportion of this trade will be diverted to the State in future years.

Firewood is produced almost entirely in the mangrove forests of Southern Johore. About half the total outturn is exported to Singapore and, though a certain amount of firewood is imported from the neighbouring islands in Dutch territory, exports far exceed imports. Figures of production and export are as follows:—

				Firewood produced. Tons.	Firewood exported. Tons.	Percentage of export.
1929	...	...	...	88,586	28,520	32.2
1930	...	...	...	78,600	38,522	49.0
1931	...	...	...	78,648	40,260	51.2
1932	...	...	...	134,503	69,816	51.9
1933	...	...	...	173,437	74,877	43.2

This is definitely a growing industry in Johore and the only limiting factor is the scarcity of mature mangroves as a result of the wasteful methods of exploitation employed before the introduction of control.

Charcoal is manufactured principally in the mangrove forests. There is a keen demand for this commodity both locally and in Singapore which, owing to the scarcity of mature areas, the State's mangrove forests are unable to supply and considerable quantities are imported from the neighbouring Dutch Islands. The following table shows figures of production export and import:—

				Charcoal produced. Tons.	Charcoal exported. Tons.	Percentage exported.	Charcoal imported. Tons.	Excess of Imports over Exports. Tons.
1929	...	...	...	2,908	333	11.5	—	—
1930	...	...	...	3,246	846	26.0	2,604	1,758
1931	...	...	...	3,173	869	27.4	2,305	1,436
1932	...	...	...	3,916	778	19.9	1,865	1,087
1933	...	...	...	3,108	973	31.9	2,443	1,570

Canes are worked extensively in the inland forests of Johore. During the depression in the rubber industry the outturn increased but signs of returning prosperity have caused a marked decrease in the trade. No actual figures of outturn can be given owing to the large variety of canes produced in the State. Practically the whole output is exported to Singapore where it is used principally in the manufacture of furniture. *Resins* are obtained from various species of the genera *Shorea* and *Hopea*. Trade in this kind of produce has increased considerably during the depression in the rubber industry but a marked decrease is now apparent. The whole of the outturn is exported to Singapore where it is re-exported to other parts of the world and used in the manufacture of varnish. Outturn in 1933 was 903 tons and in 1932 1,413 tons.

Jelutong is obtained from the tree *Dyera costulata*. The whole of the output is exported via Singapore to America where it is used in the manufacture of chewing gum. There are two factories in Johore where the latex is cleaned and pressed into blocks in preparation for export. Outturn in 1933 amounted to 318 tons and in 1932 to 202 tons.

3. ANIMAL HUSBANDRY.

In 1933 there were estimated to be 4,000 buffaloes, 6,000 cattle, 6,500 goats, and 2,000 sheep in the State; 1,559 cattle and 2,976 goats and sheep were slaughtered for consumption. There are also a number of pig-farms owned by Chinese, and 19,723 pigs were slaughtered for consumption in 1933. There is both import and export trade with other parts of British Malaya, but the industry is not of great importance.

Poultry are kept largely by Malay small-holders and there is a well-established trade in poultry and eggs for the Singapore market.

Over 9,000 persons were returned at the 1931 census as rearers of poultry and live-stock.

4. MINERALS.

The principal minerals found in Johore are tin, iron, china-clay, and gold. In all 9,307 acres of mining-land were held under title at the end of 1933 and 1,666 men and 500 women were employed in mining.

Tin.—The whole production of ore is exported to Singapore for smelting. Exports have been:—

					<i>Tons.</i>	<i>\$</i>
1929	...	...	...	...	933	1,179,685
1930	...	...	...	...	717	631,645
1931	...	...	...	...	594	433,893
1932	...	...	...	...	424	352,529
1933	...	...	...	...	306	364,173

The ore exported had an average content of 75.5 per cent. metallic tin.

Since the 1st March, 1931, the output has been restricted in accordance with the International Tin Restriction Agreement between Malaya, the Netherlands East Indies, Bolivia, and Nigeria.

Iron.—The ore is exported to Japan. Exports have been:—

					<i>Tons.</i>	<i>\$</i>
1929	...	...	...	...	743,213	7,432,150
1930	...	...	...	...	729,250	3,646,254
1931	...	...	...	...	488,877	2,444,387
1932	...	...	...	...	485,068	2,425,343
1933	...	...	...	...	408,644	2,043,220

The ore exported had an average content of approximately 64 per cent. metallic iron.

Gold.—

					<i>oz.</i>	<i>\$</i>
1932	...	...	...	...	20	903
1933	...	...	...	...	71	3,539

The production has been obtained almost entirely during prospecting operations.

China Clay.—

					<i>Tons.</i>	<i>\$</i>
1929	...	...	...	...	741	14,820
1930	...	...	...	...	410	8,200
1931	...	...	...	...	396	7,920
1932	...	...	...	...	186	3,720
1933	...	...	...	...	30	600

5. FISHERIES AND MARINE PRODUCTS.

Fishing is carried on round all the coasts and up the rivers. Deep-sea fishing is carried on by Malays on the east coast with drift-nets, operating mainly from Mersing and Sedili. The method usually adopted is that known as "moro-ami" in which highly skilled divers are employed to locate the fish, nets then being set over the area and the fish driven into them. Off-shore fishing is carried out by Chinese and Malays with seines and drag-nets, or in estuaries and sheltered bays, fishing-stakes with ground or lifting nets. River-fishing is carried on by Malays with nets, traps, and rod-and-line. Fishing for the purpose of sale is carried out under licence, fishing on a small scale, for personal consumption only, being exempt.

Revenue derived from fishing licences during the last five years was:—

<i>Year.</i>		<i>Revenue.</i>
		<i>\$</i>
1929	...	9,533
1930	...	9,698
1931	...	8,899
1932	...	8,901
1933	...	8,981

Any valuation of the total quantity of fish taken from Johore waters is impossible as the greater part goes in the fishing boats direct to the Singapore markets, only that passing through the Customs at the Ports, mostly in dried form, being recorded.

B.

FOOD SUPPLIES.

Johore is not self-supporting in the matter of food production and never will be, unless and until it ceases to be a prosperous exporter of raw products, such as rubber and copra and its large immigrant population has vanished. Chinese, Sumatra Malays, South Indians, and Javanese have flocked into the country in large numbers, not to plant rice but to share in the wealth which the cultivation of rubber so easily produced until recent times. Were the economic conditions of Johore to become such that it would be necessary for these immigrants to pursue the cultivation of rice and vegetables, it would only be a matter of time before they migrated elsewhere, leaving a thinly populated Johore to support itself in comparative poverty.

The rice produced at present would only be sufficient to feed the total population for a few weeks and rice is consequently imported via Singapore in large quantities. Sugar, milk, flour, groundnuts, vegetable oils, and meat all have to be imported via Singapore.

VI.—Industry.

Such manufactures as do not relate to the treatment of the raw materials produced in the State are negligible. There is a Chinese-owned match factory which uses local timber in making matches for local consumption.

VII.—Other Economic Activities.

Nil.

VIII.—Communications.

Sea and river.—On the west coast Johore is served by Muar, Batu Pahat, and several smaller ports—Kukup, Pontian, Benut, Senggarang. The only ocean-going steamers that call are Japanese which visit Batu Pahat for the transport of iron-ore. Local steamers from Singapore visit all the smaller ports.

On the east coast the north-east monsoon has created bars that make the estuaries accessible only to small steamers and Mersing is the only port at which even these call.

Steamships run from Singapore to Pengerang, Tanjong Surat, and Kota Tinggi on the Johore River and also to Sungei Papan, and motor-boats ply for hire on most of the navigable rivers.

Tonnage of vessels entered and cleared at all Ports in the State during the last five years.

Year.		Ocean-Going Vessels. Tons.	Sailing Vessels. Tons.	Coasting Steamers. Tons.	Total. Tons.
1929	...	395,958	187,151	193,886	776,995
1930	...	384,039	166,872	201,366	752,277
1931	...	314,003	164,511	147,444	625,958
1932	...	302,348	139,512	109,054	550,914
1933	...	236,790	224,093	100,050	560,933

Railway.—The Johore State Railway is a corridor section of the main line that runs from Singapore to Bangkok. It was built at the expense of the Johore Government and runs from Johore Bahru in the south to Gemas in the north (121 miles, 14 chains, with 20 stations and 7 halts). It was leased to the Federated Malay States Government for 21 years from 1st January, 1912, to be run in conjunction with their railway system. The lease has since been extended for a further period of 21 years from 1st January, 1933. A causeway built in 1923 links Johore with the island of Singapore by rail and road.

Roads.—The State possesses 732 miles of metalled, 65 miles of gravelled, and 12 miles of earth roads as well as 50 miles of approach roads and back lanes. On all the public roads, lorries and motor-cars and converted Ford-buses ply for hire.

IX.—Tariff.

Duties are levied on a comparatively short list of imports. Specific duties are charged on liquors, tobacco, matches, petrol, a few food-stuffs, and rubber boots and shoes. On the remainder of the list there are *ad valorem* duties at rates generally not exceeding 20 per cent. On cotton piece-goods alternative specific and *ad valorem* rates are provided, whichever is the higher being charged. The tariff provides for preferential rates or (in most cases) free entry for imports of Empire origin, except petrol, matches, cigars and unmanufactured tobacco, and some liquors.

X.—Trade Representatives.

No trade representatives abroad are maintained by the State but inquiries relating to it are dealt with in the United Kingdom by the Malayan Information Agency, Malaya House, 57, Charing Cross, London, S.W.1.

There are no overseas trade representatives in Johore but the State falls within the sphere of His Majesty's Trade Commissioner at Singapore.

KEDAH.

I.—Situation, etc.

Kedah is a Malay State under British protection on the west coast of the Malay Peninsula. It is bordered on the interior by Siam and by the State of Perak (Federated Malay States); it extends northwards on the sea coast to the River Sanglang, the boundary with the protected State of Perlis, and southwards to the Muda River, the boundary with Province Wellesley (Straits Settlements): thence the State extends east of Province Wellesley to the Krian River, which forms its boundary with Perak.

The mainland of Kedah is about 105 miles in length, and at its widest part is about 65 miles in width. Its area, including the Langkawi group of islands, is about 3,648 square miles. It is situated between latitude 5° 05' and 6° 40' North and longitude 99° 40' and 101° 10' East. The southern and central areas of the State consist mainly of undulating land broken by ranges of high hills. This area is principally occupied by large rubber plantations. The northern and coastal belt contains the finest rice growing area in Malaya. The eastern area along the Patani border is still largely undeveloped and contains reserves of well-watered land suitable for small holdings in small valleys between ranges of limestone hills.

The climate of Kedah differs in some respects from the climate of the rest of Malaya. There is a well defined dry season from the middle of December to the end of March. This dry season is sometimes prolonged and then causes serious loss to rice cultivators. On the other hand, the general flatness of the country and the abundance of natural drainage reduce the risks of any serious flooding after the heavy rains usually experienced during the north-east monsoon in October and November. As in the rest of Malaya the variation in temperature throughout the year is small. There is less variation between the day and night temperature during the greater part of the year than in the inland and east coast districts of Malaya. In 1933 the highest monthly maximum was 92·8° in March, and the lowest monthly maximum was 85·7° in November. The lowest monthly minimum was 68·8° in January and the highest monthly minimum was 74·7° in May. There is a marked difference in rainfall in different parts of the State. In 1933 the lowest total for the year was 77·32 inches at Alor Star and the highest 114·58 inches at Kulim.

Land tenure derives from the Ruler of the State, who alienates State land by grant in perpetuity or by lease for a term of years, in all cases subject to payment of premium and annual quit-rent.

Titles to land are registered, after survey by the Government Survey Department, on a system based upon the Torrens Act of Australia and New Zealand, and closely analogous to that in force in the Federated Malay States.

The area alienated amounts to approximately 1,080 square miles in 137,945 separate holdings. Lands owned by European limited liability companies or individuals amount to 219 square miles comprised in 233 estates, one cultivated with tea and the rest with rubber.

A Malay Reservations Enactment, which prohibits or restricts the passing of State land or of land held by Malays into the possession of other nationalities, has been applied to a great proportion of the whole State.

II.—Population.

The population recorded at the census of 1931 and the estimated population at the 31st December, 1933, was:—

					1931 Census	1933 Estimate
Malays	...	...	...	...	279,897	} 298,270
Other Malaysians	...	...	...	...	6,365	
Chinese...	...	...	...	...	78,415	83,470
Indians	...	...	...	...	50,824	56,009
Europeans	...	...	...	...	411	441
Siamese	...	...	...	...	12,729	} 15,176
Others ...	...	...	...	...	1,050	
					<u>429,691</u>	<u>453,366</u>

Of the population at the 1931 Census 237,831 were males and 191,860 females, giving a sex-ratio of 807 females per 1,000 males. Only 9·4 per cent. of the population was urban (i.e., living in towns of 1,000 inhabitants and over) and the largest town and capital, Alor Star, had a population of 19,080.

The occupied population was classified industrially as follows:—

Agriculture	...	...	...	...	...	158,925
Fishing	...	...	...	...	...	2,758
Mining and manufacture	...	...	...	...	...	7,345
Transport and commerce	...	...	...	...	...	15,035
Public service and professions	...	...	...	...	...	3,585
Personal service	...	...	...	...	...	7,138
						<u>194,786</u>

The Malays are principally occupied in agriculture, especially rice-cultivation, the Indians in agricultural labour on estates and the Chinese in trade and estate and general labour.

As the figures indicate, there are a considerable number of immigrants, Chinese, Indians, and Siamese, although fewer proportionately than in the Federated Malay States, Johore, and the Straits Settlements. The proportion of the population born outside Malaya was 23·9 per cent. in 1931. As elsewhere in Malaya, these immigrants generally remain only a few years and the numbers vary with the demand for labour. Latterly it is understood that there has been a

net emigration, and the proportion of settled immigrants has risen: e.g., the proportion of Malaya-born Chinese rose from 19 per cent. in 1921 to 32 per cent. in 1931. No local records of emigration and immigration are kept.

III.—Finance.

A.

CURRENCY AND BANKING.

1. The currency in circulation is that of the Straits Settlements (\$1 Straits = 2s. 4d.).
 2. The Chartered Bank of India, Australia, and China has a sub-agency at Alor Star, the capital of the State, and the Hong Kong and Shanghai Banking Corporation an office at Sungei Patani, the centre for the large rubber plantations of central Kedah.
- There are nine Co-operative Thrift and Loan Societies with a total membership of 754 and a capital of £10,467. Outstanding loans amount to £7,450. In addition there are 25 registered rural credit societies with a capital of £6,010 and outstanding loans amounting to £1,422. The total membership of these societies is 1,279.
3. The Government does not carry out any functions of a banking nature.

B.

PUBLIC FINANCE.

1. There is no public debt.

2. (A). Revenue (on basis of Estimates for 1934).

Self-Balancing Department.

	Revenue.	Expenditure.	Balance.
	\$	\$	\$
Posts and Telegraphs	138,500	222,982	—84,482
	Deficit \$84,482.		

General Revenue.

	\$	\$	Percentage.
I. Customs and Marine, i.e.—			
Export Duties	311,500		
Import Duties	1,831,300		
Other	24,050		
		2,166,850	40.4
II. Opium Monopoly		824,000	15.4
III. Farms, Licences, and Stamps		308,920	5.8
IV. Fees, etc.		167,240	3.1
V. Land, Forest, and Mine Revenue		905,990	17.0
VI. Interest		448,800	8.4
VII. Municipal (Sanitary Board)		313,427	5.9
VIII. Miscellaneous		154,400	2.9
IX. Land Sales		59,400	1.1
	Equivalent to £624,053.	5,349,027	100
Revenue of self-balancing Department set-off against Expenditure		138,500	
		\$5,487,527	

(B). Analysis of Import Duties for 1933.

Information is not available to distinguish the amount of import duties collected according to the country of origin of the goods, but the revenue collected in 1933 on the different classes was as follows:—

	\$
Food-stuffs	493,755
Tobacco and Liquors	593,239
Petroleum	427,680
Manufactured and partly manufactured goods	156,166
	\$1,670,840

3. Expenditure (on basis of 1934 Estimates).

	\$	Percentage.
I. Deficit on self-balancing Department	84,482	1.4
II. Public Debt	—	—
III. Administration	2,663,442	45.6
IV. Economic Development	991,427	16.9
V. Social Services, i.e.:		
Education Department	452,536	
Medical Department	443,154	
Other	752,263	
	1,647,953	28.1
VI. Defence	30,140	0.5
VII. Pensions, Gratuities, and Allowances	440,875	7.5
	5,858,319	100.0
Equivalent to £683,470		
Expenditure of self-balancing Department set off against Revenue.	138,500	
	\$5,996,819	

4. *Reserve Funds, etc.*

At the end of the year A.D. 1933 the Opium Revenue Replacement Fund was valued at \$6,189,617, and at the end of the year A.H. 1352 at \$6,282,919. Surplus Funds Investments at the end of A.D. 1933 were valued at \$4,030,502, against which there was a liability (Bank overdraft) amounting to \$191,393; the corresponding figures as at the end of the year A.H. 1352 were \$4,121,406 and nil respectively.

5. GRANTS-IN-AID.

No grants-in-aid or loans-in-aid have been received or asked for during recent years.

IV.—Trade Statistics.

Full trade statistics are not available.

The trade of Kedah with non-Malayan countries is included in the general statistics for Malaya—see memorandum on the Straits Settlements.

Prior to 1933, trade statistics were kept on the basis of Mohammedan years which are 3 per cent. shorter than solar years. A.H. 1351 ended on the 25th of April, 1933.

EXPORTS.

(i) *Total exports (including Bullion and Specie):—*

Year.			\$		£
1348 (1929–30)	...	...	41,015,854	equivalent to	4,785,183
1349 (1930–31)	...	...	15,063,639	„	1,757,425
1350 (1931–32)	...	...	11,922,837	„	1,390,998
1351 (1932–33)	...	...	10,559,618	„	1,231,955
A.D. 1933	...	...	13,831,186	„	1,613,638

(ii) *Exports by Classes, 1933.*

Class			\$		£
Class I	...	...	3,273,080	equivalent to	381,859
Class II	...	...	10,144,747	„	1,183,554
Class III	...	...	413,359	„	48,225
Class IV	...	...	—	„	—
			<u>13,831,186</u>		<u>1,613,638</u>

(iii) *Principal Exports, 1933.*

Article.		Quantity.	Value in \$.	Value in £.
<i>Class I.</i>				
Rice	...	26,533 tons	1,378,030	160,770
Padi	...	20,998 tons	558,537	65,163
Sago, Pearl	...	6,401 tons	412,158	48,085
Tapioca, Pearl	...	3,629 tons	234,284	27,333
Eggs...	...	10,609,002	173,492	20,241
Fish (dried and salted)	...	782 tons	123,459	14,387
Arecanuts	...	1,602 tons	102,557	11,965
Bran	...	3,745 tons	95,848	11,182
Cattle, Goats, and Swine	...	5,839	79,163	9,236
<i>Class II.</i>				
Para Rubber	...	46,668 tons	9,730,034	1,135,171
Tin-ore	...	158 tons	192,186	22,422
Copra	...	1,969 tons	119,716	13,967

IMPORTS.

(i) *Total Imports (including Bullion and Specie):—*

Year.			\$		£
1348 (1929–30)	...	...	8,430,670	equivalent to	983,578
1349 (1930–31)	...	...	8,703,572	„	1,015,417
1350 (1931–32)	...	...	7,106,622	„	829,106
1351 (1932–33)	...	...	6,698,796	„	781,526
A.D. 1933	...	...	7,180,552	„	837,731

(ii) *Imports by Classes, 1933.*

Class			\$		£
Class I	...	...	3,245,517	equivalent to	378,644
Class II	...	...	339,713	„	39,633
Class III	...	...	3,595,322	„	419,454
			<u>7,180,552</u>		<u>837,731</u>

(iii) *Principal Imports, 1933.*

<i>Article.</i>	<i>Quantity.</i>	<i>Value in \$.</i>	<i>Value in £.</i>
<i>Class I.</i>			
Cigarettes	400,579 lb.	807,930	94,258
Sugar	5,795 tons	408,900	47,705
Condensed Milk	27,155 cases	240,258	28,030
Tobacco	165,574 lb.	174,476	20,355
Rice	9,038 tons	163,356	19,058
Coffee	472 tons	155,787	18,175
Wheat Flour	1,871 tons	138,213	16,125
<i>Class II.</i>			
Coconut Oil	989 tons	146,526	17,095
<i>Class III.</i>			
Motor Spirit	4,589 tons	896,837	104,579
Kerosene	2,720 tons	371,882	43,386
Piece-goods	2,737,677 yd.	336,720	39,284
Sarongs, Slendangs and Kains ...	428,557	272,351	30,608
Chandu	6,165 lb.	165,300	19,285
Gunnies	22,723 bales	113,983	13,298
Matches	28,932,720 boxes	66,687	7,780

V.—Natural Resources.

A.

1. AGRICULTURE.

The chief resources and main occupations of the State are agricultural. Production may be divided into three groups: large estates (principally rubber); peasant small-holders growing crops (rice, rubber, etc.) for sale either locally or for export; and peasant small-holders growing food-stuffs for their own consumption. A large part of the aggregate production is of the last type but the crops grown primarily for export will be mentioned first.

Rubber occupies the largest acreage of any single crop—310,000 acres made up of about 200,000 acres in estates of 100 acres and upwards and 110,000 acres in small-holdings. Most of the estates were planted on virgin soil and their average output is high, while labour is available at a low money wage owing to the abundant supply of food-stuffs locally and the low cost of living. The area under bud-grafted rubber is over 18,000 acres of which more than half is sufficiently mature to be tapped. In 1931 about 40,000 persons were returned as engaged in rubber cultivation. The labourers on estates were mainly Indian with some Chinese and Malays.

Rubber is a very valuable crop to the small-holder in the remoter districts, who is generally self-supporting for food, as it offers a readily transportable non-perishable crop which, even at low prices, can yield sufficient cash return to meet his small money requirements.

Coconuts.—The total area at the end of 1933 was about 29,070 acres mostly in small-holdings. There has been very little new planting lately owing to the low prices offered for coconuts and copra. The copra was similar in grade to that produced by small-holders elsewhere in Malaya.

Tapioca is grown mainly in young rubber and coconut plantations and in 1933 occupied 6,164 acres, an increase of 377 acres over that of the previous year. The roots are bought from the growers by local factories. Owing to the difficulty in disposing of the product, low prices (20 to 25 cents per pikul, equivalent to about 4½d. to 5½d. per cwt.) are being paid by the factories for the raw material. The refuse is used for fattening pigs.

Tea.—There is one tea estate at Bigia with about 700 acres of lowland tea in bearing. This estate appears to have surmounted its initial difficulties, and is turning out tea of excellent quality which is consumed locally or exported. The crop was estimated at 200,000 lb.

Coffee.—The area under coffee mostly the *Robusta* variety in 1933 was small, just over 681 acres, and the plantation in some cases suffered from various pests. The quality is excellent, and locally-grown coffee is extensively used.

Tobacco.—752 acres were under tobacco in 1933. The high import duties, besides encouraging local planting, induced Chinese manufacturers to open factories in the towns, using local leaf for the preparation of cigarette tobacco and cheroots. Owing, however, to the limited market and the poor class of tobacco produced, the prices paid to growers were low, ranging from \$12 to \$22 per pikul (roughly 2½d. to 4½d. per lb.) according to quality. With suitable varieties and improved methods, a better class of tobacco should be obtainable.

Rice.—This is almost entirely a small-holder's crop, grown primarily for local food supply, and its successful cultivation depends on family labour. The area under padi is about 243,778 acres, second only to rubber, while the number of persons employed in rice cultivation is much greater than the number in the rubber industry, amounting in 1931 to some 106,000 (including 97,000 Malays and 6,000 Siamese). The production has increased considerably in recent years, as shown by the following figures:—

<i>Season.</i>	<i>Estimated yield of padi gallons.*</i>
1929-30	31,044,000
1930-31	73,466,000
1931-32	72,218,000
1932-33	75,501,900
1933-34	94,020,000

* The local unit of measure, the *gantang*, is equivalent to 1 gallon, and 1 *gantang* of padi weighs approximately 5 lb.

The 1933-34 crop was equivalent to about 141,030 tons of rice. Allowing for local consumption of 73,880 tons (at 1 lb. per head per day) the surplus available for export was estimated at 67,150 tons. Much the greater part of the production is wet padi, the acreage under dry padi being only 5,321 acres. The average yield in 1933-34 was 390 gallons per acre for wet padi and 169 gallons per acre for dry.

Other crops.—A large variety of other crops, principally food-crops, are grown. These include arecanuts, bananas, pineapples, chillies, maize, tannias, sweet potatoes, sugar-cane, beans, and many other vegetables and fruits. A large part of this production (of which no exact figures are available) is consumed by the growers, but there is also internal trade in these articles. Endeavours are being made by the Government to promote this trade by the institution of local fairs and weekly markets. In May, 1932, ten such markets had been started and by December, 1933, the number had increased to 42. The turnover at each market reaches up to £60 per week and the movement is popular and growing.

2. FORESTRY.

The area finally constituted as Forest Reserves amounted to 569,076 acres at the end of 1933. Areas in process of reservation account for 178,242 acres more. Exploitation of State land continues, but accessible areas are becoming rapidly exhausted. The regeneration of Forest Reserves prior to the release of the mature crop is being carried out. There is much valuable timber in the Forest Reserves, most of it inaccessible with the existing state of development of the State. *Keruing* (*Dipterocarpus spp.*) has been exported to England and a favourable report received. This timber tree occurs in quantity but the high quality of sawing demanded by the English market as compared with the low standards acceptable in Malaya make the export trade correspondingly less attractive to local millers. Export is, however, being continued. Some improvement in outturn of timber was shown in A.H. 1352 the amount of 556,498 cubic feet, being 134,535 more than A.H. 1351. Of this 10,204 cubic feet came from reserved forest. The outturn of firewood was 556,495 cubic feet compared with only 331,960 cubic feet in the previous year. Minor forest produce including *damar*, *jelutong*, *rattans*, *bamboos* and *mangrove bark* (for cutch) found better markets. Some *damar temak* (*Shorea hypochra*) was exported to England and repeat orders have been received. Considerable quantities of forest produce are taken free by subjects of the Sultan. The outlook for the future is excellent in view of the government's long sighted policy of adequate forest reservation combined with improvement of such forest as may be reserved.

3. ANIMAL HUSBANDRY.

Poultry breeding is carried on by small-holders on a very considerable scale.

The figures for other live-stock at a census held during 1932 showed:—

Cattle	...	...	...	...	68,542	Goats	...	...	...	...	41,381
Buffaloes	...	...	...	...	62,370	Pigs	...	...	...	...	32,651
Sheep	...	...	...	...	140						

A snap Census taken in 1933 points to an increase of about 10 per cent. in the cattle and buffalo population of the State.

Cattle and buffalo breeding in Kedah is an ever-growing industry. The cattle and buffalo population has doubled itself in the last decade. About 10,000 acres of land have been reserved for grazing purposes. The grasses on these areas are all native scrub grasses, which appear to be suitable enough for the live-stock of the country, as the animals do not appear to suffer from food deficiency diseases.

There is a steadily increasing export of live-stock to the neighbouring countries of the Federated Malay States and the Straits Settlements.

The improvement of the physique of local cattle and buffaloes by selective breeding is receiving attention.

4. MINERALS.

The export of **tin-in-ore** at 72 per cent. in A.H. 1352 (under the International Tin Agreement) was 114·6 tons. The quantity of **wolfram** exported was 36·5 tons as compared with 95·2 tons in A.H. 1351. A deposit of **iron-ore** was prospected and found to be insufficient in quantity to justify working. Very beautiful **saccharoid marble** exists in large quantities in the Langkawi Islands. An attempt to develop this by a Company failed principally owing to the lack of a market.

5. FISHERIES.

There is a considerable fishing industry, at present suffering from general low prices. The amount collected in licences in A.H. 1352 was \$7,580 as compared with \$7,549 in A.H. 1351. Engaged in the industry are some 5,179 Malays, 627 Chinese, 88 Indians, and 17 Siamese.

B.

FOOD SUPPLY.

From the information given above it will be seen that the State is more than self-supporting in rice, meat, poultry, and eggs. There is at present no prospect of its dispensing with the imports of sugar, canned milk, flour, and other articles the local production of which is impossible.

VI.—Industry.

Kedah is not an industrial State. Apart from establishments concerned with the preparation of local produce for export or consumption, e.g., rubber factories, rice-mills, and tapioca factories, most of the industries which exist are of the usual Malay "cottage" variety, consisting of plaited basket-work, mats, bags, walking-sticks, etc. Boats for local use are built locally, and carpentry

generally is being encouraged by the recent creation, on a small scale, of a Trade School, where concrete work and smithing also are taught. Carpenters' shops have been started in 15 vernacular schools and basketry in 26.

VII.—Other Economic Activities.

Entrepôt trade and tourist traffic are non-existent in Kedah.

VIII.—Communications.

Roads.—There are 402½ miles of metalled roads in the State, and 144½ miles unmetalled.

Railways.—The Federated Malay States Railways main line from Penang to Siam runs through Kedah from south to north and passes through the two largest towns of Sungei Patani and Alor Star. The length of the main line in Kedah is 60 miles. All stations are connected by road with the main road.

Rivers.—The Kedah, Merbok, Muda, and Krian Rivers are considerably used for communication purposes by raft or boat. There are in addition 225 miles of canals, but these are chiefly for drainage purposes.

Sea.—The ports of Alor Star, Sungei Patani, and Langkawi (Kuah) are visited by small vessels belonging to the Straits Steamship Company, and there is a considerable coasting trade of motor boats, junks, etc. Penang is the connecting Port for ocean-going steamers.

Air.—The Dutch Royal Air Mail Company has for some years now maintained its regular weekly service between Batavia and Amsterdam, calling at Alor Star *en route*. In January, 1934, Imperial Airways machines on the regular London-Singapore Service commenced weekly calls at Alor Star on both the outward and homeward trips. Further improvements have been and are being effected to the Alor Star aerodrome. An emergency landing ground at Sungei Patani (about 40 miles south of Alor Star) was completed during 1933.

No transport services are owned, controlled, or subsidized by the Kedah Government.

IX.—Tariff.

Duties are levied on a comparatively short list of imports. Specific duties are charged on tobacco, liquors, petroleum, and sugar (from which articles most of the Customs revenue is obtained), on some other food-stuffs, and on rubber boots and shoes. *Ad valorem* duties are charged on other articles at rates generally not exceeding 20 per cent. On cotton piece-goods there are alternative specific and *ad valorem* duties, whichever is the higher being charged. The tariff provides for preferential duties or free entry for all imports of Empire origin, except cartridges, petroleum, sugar, and tea.

X.—Trade Representatives.

No trade representatives abroad are maintained by the Kedah Government but inquiries relating to the State are dealt with in the United Kingdom by the Malayan Information Agency, Malaya House, 57, Charing Cross, London, S.W.1.

There are no overseas trade representatives in Kedah but the State falls within the sphere of His Majesty's Trade Commissioner at Singapore.

KELANTAN.

I.—Situation, etc.

Kelantan is a Malay State under British protection on the eastern coast of the Malay Peninsula, bounded on the north by the China Sea, on the east by the China Sea and the Malay State of Trengganu (under British protection), on the south by Pahang (Federated Malay States), and on the west by Perak (Federated Malay States) and Siam. It has a greatest length (north to south) of 115 miles, a greatest breadth (east to west) of 60 miles and a total area of 5,713 square miles.

Behind a low sandy coast line of some 60 miles in length lies a fertile plain of about 1,000 square miles in area, densely populated (over 500 to the square mile in most parts) and closely cultivated with rice, coconut palms, and fruit trees. South of this plain the country is hilly and broken, the highest hills being those of the main range of the Peninsula, which forms the boundary with Perak, and the Tahan range on the Pahang border, many peaks exceeding 6,000 feet in height. This part of the State is thinly populated; it contains the bulk of the rubber estates, but large areas of it are still covered with forest.

The features of the climate are uniform temperature, high humidity, and copious rainfall (130 inches on the coast and 115 inches inland on the plains along the Kelantan River). The lowest temperatures and heaviest rainfalls are experienced during the period of the north-east monsoon (which begins late in October and ends in March).

The following are the observations made at Kota Bharu (capital of Kelantan) during 1933. The mean maximum temperature was 87·3° F. and the mean minimum was 72·7° F. The highest temperature recorded was 94° F. on several occasions, and the lowest 65° F. on several occasions in February, 1933. The total rainfall was 126·74 inches; the greatest fall in 24 hours being 7·24 inches on 17th November, 1933.

All land not alienated is State land. Alienated land is held under a system of grants in perpetuity based on theodolite survey and entry in Land Office Registers. The title covers surface rights only and is subject to certain reservations in favour of the Government, such as the right to all minerals and to resumption for public purposes on payment of compensation, and to liabilities as regards drainage, etc.

II.—Population.

The population recorded at the census of 1931 and the estimated population at the 31st December, 1933, was:—

	1931 Census	1933 Estimate
Malays	327,097	339,336
Other Malaysians	3,677	
Chinese	17,612	16,011
Indians	6,752	5,464
Europeans	124	114
Others	7,255	7,164
	<u>362,517</u>	<u>368,089</u>

Of the population at the 1931 Census 184,705 were males and 177,812 females, giving a sex-ratio of 963 females for 1,000 males.

Only 6.5 per cent. of the population were urban (living in towns of 1,000 inhabitants or more), and the largest town, Kota Bharu, had a population of 15,479.

The occupied population was classified industrially as follows:—

Agriculture	128,263
Fishing	6,627
Mining and manufactures	5,566
Transport and commerce	11,123
Public services and professions	2,059
Personal service	4,872
	<u>158,510</u>

Unlike most of Malaya, Kelantan has a very small immigrant population (mainly Chinese, with some Indians and Siamese) and at the census of 1931 only 4.6 per cent. of the population were recorded as born outside Malaya. Of the immigrant communities, also, a greater proportion appear to be permanently settled, the proportion of Chinese born in Malaya being 50 per cent., as compared with 31 per cent. for the whole Peninsula, and there is much less movement of population. No detailed records are kept of immigrants and emigrants.

III.—Finance.

A. CURRENCY AND BANKING.

1. The currency in circulation is that of the Straits Settlements (\$1 Straits = 2s. 4d.).

2. There is a branch of the Mercantile Bank of India in Kota Bharu. There are no agricultural or co-operative banks, but there is a Post Office Savings Bank (with a total amount of \$24,900 standing to the credit of 414 depositors as at 31st December, 1933).

3. The Government carries out no functions of a banking nature, apart from the Post Office Savings Bank and the grant of loans in a few special cases, mainly to encourage building and town improvement. The number of such loans outstanding at the end of 1933 was 35 amounting to a total of \$263,626.

B. PUBLIC FINANCE.

1.—(a) *Public Debt*.—There are no publicly-issued loans, but the following debts were owed to the Straits Settlements and Federated Malay States Governments at 31st December, 1933.

	\$
Straits Settlements Consolidated Loan (2 per cent.)	4,680,684
Federated Malay States "Duff" Loan (2 per cent.)	300,000
Straits Settlements 1931 Loan (4 per cent.)	500,000
	<u>\$5,480,684</u>
Equivalent to	£639,520

The first two loans were raised in connexion with the settlement of litigation with the Duff Development Company; the last for development purposes of a remunerative nature.

(b) Annual amount required for

(i) Interest:—

(1934) \$122,000 (amount due).

(ii) Sinking Funds:—

No special sinking funds have been constituted to provide for repayment of principal, but repayment of principal of the Straits Settlements 1931 Loan has commenced, and a sum of \$25,000 is provided in the 1934 Estimates for this purpose of which half has already been paid—the remaining sum by half-yearly instalment being due on the 31st December, 1934. It is hoped to make regular provision in succeeding budgets for debt redemption in accordance with the State liability for repayment.

(c) *Total value of Sinking Funds:—*

Nil. (\$25,000 included in the 1934 Estimates for this purpose.)

2.—(A) *Revenue (on the basis of 1934 Estimates).**Self-balancing Departments.*

	<i>Revenue.</i>	<i>Expenditure.</i>	<i>Balance.</i>
	\$	\$	\$
Electrical Dept.	35,000	27,720	+ 7,280
Posts and Telegraphs	34,800	53,487	— 18,687
	69,800	81,207	— 11,407

Net deficit \$11,407.

General Revenue.

	<i>Revenue.</i>	<i>Expenditure.</i>	<i>Percentage.</i>
	\$	\$	
I. Land and Forests Revenue	503,720		28.5
II. Customs and Marine, i.e.—	\$		
Export Duties	117,300		
Import „	591,000		
Other	20,700		
	729,000		41.6
III. Opium Monopoly	170,000		9.7
IV. Excise, Licences, Fees, and other internal revenue...	217,683		12.3
V. Municipal	109,830		6.2
VI. Other Revenue	30,750		1.7
	1,760,983		100
Equivalent to £205,448			
Revenue on self-balancing Departments set off			
against Expenditure	69,800		
	1,830,783		

(B) *Analysis of Import Duties for 1933.*

It is not possible to give full details of the amount of import duty collected during 1933, but the following table shows the amount of duty collected on the principal items.

	\$
Tobacco	155,242
Sugar	59,175
Spirits	22,261
Salt	15,086
Kerosene and Benzine	113,243
Miscellaneous goods	195,195

3. *Expenditure (on basis of 1934 Estimates).*

	<i>Expenditure.</i>	<i>Percentage.</i>
	\$	
I. Deficit on self-balancing Departments (see 2(a) above)	11,407	0.7
II. Debt charges	122,000	7.0
III. Administration	800,381	45.5
IV. Economic Development	252,019	14.4
V. Social Services, i.e.—	\$	
Education Department	46,152	
Medical „	173,580	
Other	112,471	
	332,203	19.1
VI. Defence	—	—
VII. Pensions, gratuities, and allowances... ..	232,723	13.3
	1,750,733	100
Equivalent to £204,252		
Expenditure on self-balancing Departments set off		
against Revenue	69,800	
	1,820,533	

4. *Amount of reserve funds, with liabilities against them and other important assets of Government.*

There are no special reserve funds. At 31st December, 1933, the excess of current assets over liabilities was \$715,975 or, including the unexpended balance of the Straits Settlements loan drawn on Development Account, \$731,906.69 of which a sum of \$221,500 was invested in the purchase of Singapore Municipal 4½ per cent. Loan Stock, \$11,000 was maintained on fixed deposit, and the balance remained on current account with the Mercantile Bank of India.

5. No grant-in-aid or loan-in-aid has been asked for or obtained in recent years except the grant of £16,600—from the Colonial Development Fund for irrigation works in Kelantan approved in September, 1931, to be spread over three years and consisting half of a free grant and half of loan. The amount received up to the 31st December, 1933, was \$111,428 or £13,000 of which \$55,714 or £6,500 represents loan.

IV.—Trade Statistics.

Full trade statistics are not available. The trade of Kelantan with non-Malayan countries is included in the general statistics for Malaya—see memorandum on the Straits Settlements.

EXPORTS.

(i) *Total Exports (including Bullion and Specie).*

		\$	equivalent to	£
1913	...	2,022,307		235,936
1930	...	4,189,374	„	488,760
1931	...	2,854,079	„	332,976
1932	...	2,428,196	„	283,290
1933	...	3,454,098	„	402,978

(ii) *Principal Domestic Exports, 1933.*

Article.	Quantity.	Value in \$	Value in £
<i>Class I.</i>			
Arecanuts			
Dried	2,266 tons	151,582	17,685
Fresh	—	1,672	195
		153,254	17,880
Fish	1,003 tons	117,361	13,692
Cattle	3,164	92,765	10,823
Poultry	100,498	24,312	2,836
<i>Class II.</i>			
Rubber	9,213 tons	1,906,021	222,369
Copra	6,774 tons	290,472	33,888
Jungle produce	—	70,048	8,172
Manganese Ore	2,867 tons	26,716	3,117
<i>Class III.</i>			
Textiles			
Silk	—	10,641	1,241
Cotton	—	23,057	2,690
		33,698	3,931
<i>Class V.</i>			
Gold	—	77,154	9,001

IMPORTS.

(i) *Total Imports (including Bullion and Specie).*

		\$	equivalent to	£
1913	...	3,948,325		460,638
1930	...	6,276,226	„	732,226
1931	...	2,977,158	„	347,335
1932	...	3,161,326	„	368,821
1933	...	4,057,602	„	473,387

(ii) *Principal Imports, 1933.*

Article.	Quantity.	Value in \$	Value in £
<i>Class I.</i>			
Tobacco (all kinds)	—	331,542	38,680
Tinned Milk	12,422 cases	128,360	14,975
Rice	1,821 tons	97,247	11,345
Sugar	911 tons	67,124	7,831
Wheat Flour	709 tons	64,114	7,480
<i>Class III.</i>			
Textiles (all kinds)	—	979,822	114,313
Petroleum	283,697 gal.	163,456	19,070
Benzine	223,343 gal.	141,244	16,478
Drugs and Medicines	—	114,194	13,323
Motor Vehicles	—	30,735	3,586
Cement	1,334 tons	26,767	3,123
Machinery	—	25,641	2,991

V.—Natural Resources.

A.

1. AGRICULTURE.

The indigenous population is almost entirely dependent on agriculture and the whole of the agricultural production is in native hands, with the exception of rubber estates and two or three coconut and other estates. The agricultural products fall into two classes, those primarily intended for home consumption and those intended for export. Of the first class rice takes a leading position occupying as it does a greater area than any other crop grown in the country; while sweet potatoes, tapioca, yams, ground-nut, tobacco, sugar-cane, ginger and bananas and other fruits are produced in varying quantities. Of the exported products, rubber represents the greatest value followed by copra and arecanuts.

Rubber.—The cultivation of rubber is extensively carried on by both Europeans and Malays, and a total area of some 92,789 acres has been alienated for this purpose of which 34,146 acres are cultivated by small-holders (either as a separate or mixed crop in conjunction with coconuts, arecanuts and other products), and a total of 33,096 acres represents large estates mostly in European ownership, while the balance of some 25,547 acres approximately is estimated to be still unplanted though alienated for the purpose of rubber cultivation. The total number of persons employed on large estates during the year was approximately 3,662 of whom 2,296 were Malays, 869 South Indians, 452 Chinese and 45 Javanese and other races. It is not possible to give figures of the number of persons employed on rubber cultivations outside the large estates, as the vast majority of Malay cultivators are small peasant proprietors not exclusively employed on this form of cultivation but living in their own homes and devoting a large part of their time to the cultivation of rice and other food crops and possessing their rubber plots as an auxiliary source of income. The method of production on large estates is similar to that followed elsewhere in the Peninsula and owing to the fertility of the soil and the good situation in the upper areas of the State where the big estates are situated, the trees are generally of a high yielding variety. There are no extensive areas of bud-grafted rubber in Kelantan, however, and it is estimated that the area so cultivated does not exceed some 2,000 acres. The native rubber has, in the past, been of poorer quality and finish than in any other parts of Malaya, the sheet prepared by the Kelantan peasantry being generally of low quality containing a considerable amount of moisture, bark and other impurities due largely, in the past, to lack of processing machinery and technical knowledge on the part of the peasantry. It has, therefore, obtained a proportionately lower price than the finished article produced by the small-holders elsewhere in Malaya. In late years, however, a considerable deal has been done by the recently formed Agricultural Department to impart a knowledge of improved methods and a large number of hand-rollers have been supplied on easy repayment terms to small-holders to induce them to produce and cure sheet rubber—in place of the wet slab rubber—and a considerable improvement in the finished article has been observable over the past few years. During the years 1929-1933 the low price obtainable for rubber, coupled by the high cost of transport from Kelantan and the fact that most of the small-holders were not wholly dependent on this industry for a living, induced a lack of interest in rubber holding and many small-holders ceased tapping altogether, while many European estates, especially in 1931 and 1932 for similar reasons of transport and slump economy, rested large areas of their estates so that the quantity of rubber exported during those years from Kelantan was proportionately less than elsewhere in Malaya. The rise in price of the commodity at the end of the first quarter of 1933 brought about a marked increase in the products of native rubber and enabled many big estates to recommence tapping, so that the exports for the last seven months of the year represented about three-fourths of the total export for the whole year, which amounted to a figure of 9,213 tons—almost twice the figure for the previous year—while the value of 1933 rubber exports increased to \$1,906,021 from the figure of \$731,223 for 1932.

The figures for production and export of rubber for the last five years were as follows:—

Year.	Total Quantity.	Total Value.
	Tons.	\$
1929	8,043·19	5,732,427
1930	7,272·51	2,919,143
1931	6,384·05	1,157,303
1932	5,146·02	731,223
1933	9,213·04	1,906,021

Coconuts.—The coconut cultivation is, in Kelantan, almost entirely a native industry, there being only some four estates of any considerable area in the ownership of Europeans. The bulk of the coconut growing area in the State is situated on the sandy coastal belt although on almost all small-holdings palms are found either as a single crop or mixed with other forms of cultivation, and for this reason it is not possible to give accurate figures of the acreage planted, but it was estimated that the area under this crop was approximately 57,271 acres in 1931. The trees grow and mature well, but, owing to the poverty of the soil in many places, fail to produce anything but the poorest crop. An examination of the produce over the last ten years of a coconut estate planted on representative land in the State shows that the greatest yield occurs in May to July, and that over 50 per cent. of the crop is harvested in these months. There is, moreover, a very marked annual variation in the yield. A large part of the nuts is used by the peasantry for cooking purposes or for conversion into coconut oil and the remainder is converted into copra for export, while the European estates produce for export only. As the result of the peasant's inability to wait for his profit and his fear of losing weight by drying, the locally produced copra is of poor quality and receives a corresponding price. The decline in the price of this commodity over the last few years has resulted in a diminished interest in copra industry and exports have progressively decreased in value. The Agricultural Department have, however, spent much time in instructing peasants in the erection of efficient kilns and the manufacture of copra and it is hoped that the quality of copra exported from the State will be considerably improved as the result of these experiments. During the year the price of the locally produced copra had declined to the low figure of \$1·20 per picul. The figures of production and export of copra over the last five years are as follows:—

Year.	Quantity.	Value.
	Tons.	\$
1929	7,272·96	941,482
1930	5,355·64	555,419
1931	6,497·82	449,857
1932	4,012·56	306,658
1933	6,773·98	290,472

Arecanuts.—Arecanut occurs in mixed holdings and not as a sole crop, no defined areas being planted with this product but most of the small-holdings of the peasantry containing a certain number of trees intermixed with other forms of cultivation in varying proportions. The greatest area of arecanut is to be found in the Pasir Puteh district of the State where the crop is usually harvested during the months of March, April and May with slight seasonal variations according to the weather experienced during the fruiting season. The nuts, after sun-drying, are sold in the split form to local produce dealers who ship to Singapore at prices which range from \$2.30 to \$2.40 per picul during 1933. The State enjoys considerable export trade in the commodity, the amount exported during the year being some 2,266 tons—as against an export for the previous year of some 1,393 tons—an increase due in great part to the reduction in May, 1933, of the export duty on the commodity from a rate of 50 cents per picul to 5 per cent. *ad valorem*. It is not possible to give accurate figures of the area of land under this form of cultivation owing to the fact that it occurs only in mixed holdings. The figures of production and export of arecanut for the last five years are as follows:—

Year.	Quantity.	Value.
	Tons.	\$
1929	1,553.6	153,254
1930	1,434.26	169,216
1931	1,855.91	258,918
1932	1,393.39	210,520
1933	2,266.45	197,520

Food products.

(i) **Rice** occupies by far the greatest area of any crop and some 110,000 persons (about 70 per cent. of the occupied population) were engaged in its cultivation at the census of 1931. It is the principal food of the people and the State is nearly but not quite self-supporting in it. Both wet and dry types of padi are cultivated, the latter being restricted to areas which cannot be irrigated by methods at present available to the peasant. The services of an Irrigation Engineer and funds placed at the disposal of the State by the Colonial Development Fund have, however, opened up possibilities of increasing yield over all types of land and reducing seasonal fluctuations in crop to a minimum. In the 1932-1933 season an area of 147,330 acres was planted with padi of which 110,120 acres were under the wet type. The total yield of padi amounted to 45,376.50 tons, the average yield for the State for wet padi being 220 gantangs (gallons) per acre and for dry padi 156 gantangs per acre. The figures quoted above represent an increase in planted area of 5,953 acres over the previous season, but a decrease in yield of 1,204 tons of padi. In the 1933-34 season a total area of 133,200 acres was planted with padi of which some 99,557 acres were under the wet type. Serious flooding was experienced during November and early December, doing considerable damage in Pasir Puteh and Kota Bharu districts, but a total of 50,576.4 tons of padi was harvested during the year as against a quantity of 45,376.5 tons for the last year. The average yield was at the rate of 253 gantangs per planted acre. An import duty on rice was introduced as from the 9th January, 1933, with a view to encouraging domestic production. The amount obtained from the duty during the year was \$6,535.61 derived from an import of 1,821.39 tons—a decrease in volume of approximately 2,115 tons as compared with the import of the previous year. The production of padi over the last five years is as follows:—

Year.	Area.	Quantity.	Value.
	Acres.	Gantangs.	\$
1929-30	174,648	14,214,263	994,998
1930-31	101,725	19,057,304	1,334,011
1931-32	141,376	31,057,645	2,174,035
1932-33	147,329	30,251,586	2,117,031
1933-34	133,200	33,718,269	2,360,278

Other minor crops are those enumerated below. They are mostly cultivated in mixed holdings, are largely seasonal, and produced for local consumption only, no part being exported.

Fruit.—Some 2,049 acres are estimated to be under cultivation of fruit trees. Varieties grown are the durian, mangosteen, rambutan, pelasan, langsat, rambai and chiku. The main crop is usually in October or November though there is sometimes a subsidiary fruiting season in June and July. Pineapples and bananas are also grown in considerable quantities and sold locally in the village markets. There is little or no export of fruit and no canning industry in the State.

(ii) **Other crops.**—*Sweet potato* is not grown in large areas, but rather as a garden crop, the majority of peasants planting a few square yards in the vicinity of their houses to serve as a subsidiary food supply and in the vicinity of markets as a source of casual cash.

Sugar-cane is cultivated in the vicinity of markets and in areas where transport is readily available. The majority of the crop is consumed in the unmanufactured state while a portion is ground in native mills and a coarse sugar produced for local consumption.

Tapioca cultivation is chiefly confined to localities adjoining towns and villages where the crop is converted into ready cash and consumed in the rough state, no portion being converted into flour.

Tobacco is grown during the dry season on rice and other lands and is entirely consumed locally. The crop is well cared for but only a very rough sun-curing is effected and market reports state that the leaf would be unsaleable for manufacturing purposes. The bulk of the leaf is harvested in June and July. It is then dried in the sun and chopped for consumption within the State. Prices in local markets varied from \$50 to \$100 per picul.

Vegetables consisting of water melons, gourds, beans, groundnuts, etc., are grown during the dry season. These grow well on islands and alluvial banks of the river and, when no early flooding is experienced, all these crops are successfully harvested.

Coffee.—The area under this crop is negligible and consists of three small areas planted on estates.

2. FORESTRY.

With the secondment from the Federated Malay States of an Assistant Conservator of Forests as State Forest Officer on the 1st October, 1933, a separate Forest Department was constituted in Kelantan. In addition to several small "Glam" Reserves, the definition of which is uncertain and requires revision, there are four main forest reserves in the State with a total estimated area of 128,680 acres, although large areas in the southern part of the State not yet reserved or explored are still covered with virgin jungle. The more accessible forests are poor in respect of "*chengal*" and "*merbau*", hardwoods much prized for constructional work in Malaya, due to the demand of a large population who have, in the past, been often extremely wasteful in their methods of timber extraction to meet their domestic needs; but "*resak*", "*kumus*", "*kruian*", "*seraya*" and "*kulim*" are plentiful as is also "*tembusu*". A considerable amount of forest reconnaissance and exploration has been carried out by the Forest Department since its inception and these investigations have established the fact that Kelantan possesses valuable and extensive areas of forest timbers in the more inaccessible parts of the State—both of the hardwood and softwood varieties, most in demand commercially. There are also considerable areas of jelutong which have been rather badly worked by contractors in the past resulting in considerable damage to the trees by bad tapping. There is a very limited export of timber from the State as this trade has not yet been developed, though attempts are being made to find markets for the better grades of wood in Singapore and elsewhere. An amount of some 24.9 tons to the value of \$746 was exported in 1933 as against 26.4 tons in 1932 valued at \$994. The export of jelutong, gums and resins over the last five years is as follows:—

Jelutong.				Gums and Resins.			
Year.	Quantity.	Value.		Year.	Quantity.	Value.	
	Tons.	\$			Tons.	\$	
1929	(Figures not available).			1929	58.00	13,104	
1930	127.50	61,242		1930	22.00	4,856	
1931	193.02	79,406		1931	189.51	25,809	
1932	240.94	91,393		1932	1.40	105	
1933	197.49	67,802		1933	17.10	1,393	

3. ANIMAL HUSBANDRY.

Cattle and Buffaloes.—The State carried in 1933 a stock of 37,898 head of buffaloes and 113,935 cattle, an increase of 1,400 head of both classes of stock over the previous year. The removal of the export quota allowed of the building up of a considerable export trade and at the same time tends to reduce serious over-stocking. The following are the figures of cattle and buffaloes exported from the State for the past five years:—

Year.	Head.	Value.
		\$
1929	870	44,976
1930	240	8,635
1931	171	7,430
1932	312	12,115
1933	3,164	92,765

The keeping of poultry, sheep and goats further supplement the food supply and the income of the peasant, although the first, at least, receive little care, being given no hand feeding or adequate housing. A considerable trade exists in the export of poultry to Singapore. Prices paid to the peasant early in the year ranged from 8-12 cents per head for birds of 1½ katies, but by November the price had risen to 10 cents per kati, while the price paid for one egg averaged one cent each in the local market. The following are the returns of figures in respect of sheep, goats, poultry and eggs exported from the State during the last five years.

Poultry.				Eggs.			
Year.	Head.	Value.		Year.	No.	Value.	
		\$				\$	
1929	56,856	22,953		1929	26,400	264	
1930	51,744	18,831		1930	10,000	100	
1931	31,808	10,641		1931	1,000	10	
1932	24,671	6,215		1932	92,000	920	
1933	100,498	24,312		1933	106,600	1,066	

4. MINERALS.

Mining is of little actual importance in Kelantan but there are mineral deposits of potential value.

Tin is found in the foot hills at the edge of the coastal plain, where mining would be difficult without interference with agriculture; but the most promising deposits are those of the Sungei Peiras and other small tributaries of the Nenggiri River. These have to a certain extent been developed owing to the completion of the East Coast Railway and the opening up of a bridle path known as the Gua Musang—Kuala Betis road which touches some parts of the hitherto inaccessible mining areas in the Ulu Kelantan district. In 1932, however, the operation of the International Tin Regulation Scheme temporarily suspended all interest in tin mining activity in this State, and there was, therefore, no tin exported from the State in that year. The following table shows the amount and value of tin exported from the State during the last five years:—

Tin-Ore.—

Year.	Quantity. Tons.	Value. \$
1929	1.64	1,785
1930	3.38	3,799
1931	1.35	959
1932	—	—
1933	0.47	633

Gold is found around Pulai and the valleys of the Galas and Pergu Rivers (all in Ulu Kelantan district). The gold mines in the State are held under Agreement for Mining Leases or approved applications. In 1933 there were 18 such Mining Leases in force with an area of some 2,288 acres, but according to monthly returns submitted, nine only were working during the year with a total output of 1,040 tahils; only two Chinese mines, however, Panggong Lalat, with an output for the whole year of 452½ tahils and Loy Sen Mine with 324½ tahils, can be said to have shown reasonably prosperous results. There is no return showing any quantity of gold as exported from the State earlier than 1932. The figures, however, showing the amount and value of gold exported during the last two years are as follows:—

Gold.—

Year.	Quantity. Tahils.	Value. \$
1932	202.30	9,289
1933	1,543.90	77,154

Iron.—There has hitherto been little actual development towards exploitation of the large deposits of haematite ore discovered in 1929 in the Temangan area, but a recently formed Japanese Company, incorporated in Tokio with an initial capital of one million yen has now become interested in the area and is making proposals for the extraction of the deposits.

Manganese.—In addition to the export in 1932 of 50 tons of Manganese valued at \$420, the Nippon Mining Company operating at Gual Priok had considerably increased their output of manganese and an amount of 2,866 tons valued at \$26,716 was exported from the State in 1933.

Besides monazite, galena, pyrites and blende which are known to exist in the State of Kelantan, limestone building stone, sand and gravel are also abundant away from the alluvial plain.

5. FISHERIES.

The Malay coastal population lives mainly by fishing, which is an exclusively Malay occupation in Kelantan. 6,500 fishermen were returned at the 1931 census. There has been little change in the number of persons engaged in this occupation in the interim.

The following are the returns of fish exported from the State in the last five years:—

Fish—Dried and Salted.—

Year.	Quantity. Tons.	Value. \$
1929	939.80	188,568
1930	563.20	109,641
1931	820.64	98,136
1932	754.13	89,249
1933	1,002.70	117,361

B.

FOOD SUPPLIES.

The staple food of the population is rice. The 1932-33 crop though some 1,204 tons less in volume than the unusually abundant crop of the previous year was nevertheless well up to the standard of recent years and there was a small export. During the year 1,821 tons were imported, representing the amount consumed by immigrants who prefer rice from their own country and that portion of the town population who prefer fully milled white rice. It cannot be said that the State is at present self-supporting in normal years, but, in view of the work of the Department of Agriculture in improving strains and of the extension of padi areas by irrigation, it may be expected within a few years to be not only fully self-supporting but even to have a regular surplus available for export.

Ample supplies of fruit, poultry, and fish are available locally (though a small quantity of fish is imported). The principal food-stuffs imported during 1933 were as follows:—

		\$
Tinned milk	12,422 cases	128,360
Sugar	911 tons	67,124
Wheat flour	710 tons	64,114

VI.—Industry.

A match factory has been established, which supplies the needs of the State, an embargo having been placed on the import of matches. The factory is owned by an Indian and employs a daily labour force of about 140 Malays.

There is a small but successful home-industry in sarong making and silverwork. The products are sold through the Kelantan Branch of the Malayan Arts and Crafts Society; sales in 1933 amounted to \$14,000 as against \$9,562 in the previous year.

VII.—Other Economic Activities.

None. There is no entrepôt trade or tourist traffic.

VIII.—Communications.

There are three ports—Tumpat, Bachok, and Semerak, at which coasting steamers plying between Singapore and Bangkok call regularly for passenger and goods traffic, except during the north-east monsoon. There are no wharves and goods must be taken ashore in lighters or small boats.

There is railway communication from Tumpat southwards to the Federated Malay States and Singapore and northwards to Bangkok. It is also possible to reach Penang (Prai) by railway via southern Siam and Kedah. All the railway lines in Kelantan belong to the Federated Malay States Railways administration: no subsidy is given by the Kelantan Government. The total length of the railway line in the State amounts to 152 miles.

Total road mileage at the end of 1933 was 212 miles, distributed over the north-eastern portion of the State. The road from Kota Bharu southwards reaches as far as Kuala Krai. There is road communication with Trengganu but not with the Federated Malay States or Siam.

The rivers are still widely used for transport by small craft.

There are no air services.

IX.—Tariff.

Duties are levied on a fairly extensive list of imports. Specific duties are charged on liquors, tobacco, matches, petroleum, sugar, a number of other food-stuffs, rubber boots and shoes, and a few other articles. On the remainder there are *ad valorem* duties, generally not exceeding 20 per cent. Alternative specific and *ad valorem* duties on cotton piece-goods and other textiles were in force in 1933, but were later (1934) altered, as far as foreign textiles are concerned, by action to implement the Straits Settlements "Importation of Textiles (Quotas) Ordinance, 1934" for limiting the imports of foreign textiles into Malaya. The tariff provides for preferential rates or free entry for a number of imports of Empire origin.

X.—Trade Representatives.

No trade representatives abroad are maintained by the Kelantan Government but inquiries relating to the State are dealt with in the United Kingdom by the Malayan Information Agency, Malaya House, 57, Charing Cross, London, S.W.1.

There are no overseas trade representatives in Kelantan but the State is within the sphere of His Majesty's Trade Commissioner at Singapore.

PERLIS.

I.—Situation, etc.

Perlis is the most northerly of the Malay States, situated on the west coast of the Malay Peninsula, between latitude 6° and 7° north. Apart from its short coast line of 13 miles, in the south-west of the State, it is bordered by Siam to the north and the protected Malay State of Kedah to the south. It consists of a coastal plain, with higher land inland and isolated limestone hills rising out of the plain. There is only one river of importance, the Perlis River. The area of the State is about 316 square miles.

The *climate* is subject to the influence of both the north-east monsoon, lasting from November to March, and the south-west monsoon, between July and September.

The total rainfall at Kangar, the administrative headquarters, for 1933 was 72·35 inches, the maximum monthly rainfall being 10·21 inches in October and the minimum 0·61 inch in February. The highest recorded rainfall was 106·3 inches in 1913 and the lowest 65·6 inches in 1928.

The shade temperature at Kangar varied between a mean maximum of 88·6° F. and a mean minimum of about 73·5° F. The highest maximum temperature recorded was 97° F. in March and the lowest minimum 67° F. in February.

The months of December and January are usually cool and pleasant but from February to April hot dry weather is usually experienced with hot dry winds blowing continuously, a rather unpleasant period.

Land Tenure.—Agricultural land is held under title known as a "Small Grant" alienated in perpetuity at an annual rent.

Mining lands are held on leases which are usually for a period of 5 to 10 years. There are in existence a few Mining Licences issued under the old Mining Laws; under these licences no area is prescribed and the holders are entitled to follow up underground streams from a fixed point. Such licences are quite peculiar to Perlis and were devised to suit the unique mining conditions to be found in this State which will be mentioned later. The area of land held under "Small Grant" at the end of A.H.1352 (April, 1934) was approximately 56,000 acres.

Land held under mining title amounted at the end of that year to approximately 2,490 acres.

II.—Population.

The population recorded at the census of 1931 was:—

Malays	...	...	...	...	...	39,716
Other Malaysians	...	...	...	...	...	115
Chinese	...	...	...	...	...	6,500
Indians	...	...	...	...	...	966
Europeans	...	...	...	...	...	3
Siamese	...	...	...	...	...	1,616
Others	...	...	...	...	...	380
						49,296

Of this total, 26,027 were males and 23,269 females, giving a ratio of 894 females for 1,000 males. Only 4.1 per cent. of the population was urban (i.e., living in towns of 1,000 inhabitants or more); in fact the only "urban" population was that of the capital of the State, Kangar (population 2,010).

The occupied population was classified industrially as follows:—

Agriculture	...	...	...	...	...	20,837
Fishing	...	...	...	...	...	482
Mining and manufacture	...	...	...	...	...	1,442
Transport and commerce	...	...	...	...	...	1,174
Public service and professions	...	...	...	...	...	326
Personal service	...	...	...	...	...	942
						Total 25,203

The estimated population on the 31st December, 1933, was 52,231 of whom 41,419 were Malaysians and 7,654 Chinese.

Immigration is of comparatively little importance (in 1931 only 13.5 per cent. of the population were recorded as born outside Malaya) but there are a number of immigrant Chinese and smaller numbers of Siamese and Indians. The former supply many of the traders and artisans. As elsewhere in Malaya, many of the immigrants stay only a few years and there is frequent movement to and fro, but no detailed records of the movement are kept.

III.—Finance.

A. CURRENCY AND BANKING.

1. The currency in circulation is that of the Straits Settlements (\$1 Straits = 2s. 4d.).
2. There are no banks in the State except the Post Office Savings Bank at Kangar. At the end of 1933, a total amount of \$12,384 stood to the credit of 132 depositors in this bank.
3. Government is not interested in any operation of a banking nature other than the Post Office Savings Bank mentioned.

B. PUBLIC FINANCE.

1. There is no public debt.

2 (A). Revenue (on basis of 1934 Estimates).

					\$	Percentage.
I. Customs, i.e.—						
Export Duties	...	...	...	67,500		
Import "	...	...	...	165,000		
Other ...	...	...	...	100		
					232,600	46.2
II. Lands and Mines	...	...	...	83,970		16.7
III. Chandu (opium)	...	...	...	120,000		23.8
IV. Municipal	...	...	...	16,590		3.3
V. Other Revenue	...	...	...	50,090		10.0
					\$503,250	100
Equivalent to	...	...	...	£58,713		

(B). Analysis of import duties. A.H.1352 (April 1933—April 1934).

						\$
Tobacco	...	...	...	...	...	63,715
Sugar	...	...	...	...	...	41,268
Liquors	...	...	...	...	...	15,529
Coffee and tea	...	...	...	...	...	5,723
Milk	...	...	...	...	...	2,484
Groundnut oil, Kachang and gingelly oil	...	...	...	...	...	3,262
Benzine	...	...	...	...	...	19,077
Cotton goods	...	...	...	...	...	10,574
Kerosene	...	...	...	...	...	7,804
Matches	...	...	...	...	...	6,630
Miscellaneous*	...	...	...	...	...	1,821
						\$117,887

* Under "Miscellaneous" import duties fall the various duties imposed as the outcome of the Ottawa Conference.

3. *Expenditure (on basis of 1934 Estimates).*

		\$	Percentage.
I. Deficit on self-balancing Departments	...	—	—
II. Debt Charges	...	—	—
III. Administration	...	260,982	52.0
IV. Economic Development	...	95,380	19.0
V. Social Services, i.e.—		\$	
Education Dept.	...	40,442	
Medical	...	23,486	
Other	...	54,982	
		118,910	23.8
VI. Defence	...	—	—
VII. Pensions, Gratuities, and Allowances	...	25,815	5.2
		\$501,087	100
Equivalent to	...	£58,460	

4. *Reserve funds.*

The State has an Opium Revenue Replacement Fund of \$196,375, held in investments; and an excess of general assets over liabilities (at 15th April, 1934) of \$267,612, held mainly in investments and bank deposits.

5. No grants-in-aid or loans-in-aid have been either asked for or received in recent years.

IV.—Trade Statistics.

No full statistics of the trade of Perlis are kept. It is therefore not possible to give trade figures similar to those of the other Unfederated Malay States. The trade with non-Malayan countries is included in the returns for Malaya—see memorandum on the Straits Settlements.

V.—Natural Resources.

A.

1. AGRICULTURE.

The great bulk of the population is engaged in rice cultivation, which is entirely in the hands of small-holders. The area cultivated last season was approximately 42,000 acres. Production is normally more than adequate to meet the local consumption and there is usually a surplus for export. The average yields are low and experimental padi stations have been established for the purpose of testing various new strains of seed and of making manurial experiments. It is hoped by introducing higher yielding strains and the more effective use of manures to increase the average yields considerably.

The area under rubber cultivation is approximately 5,000 acres. There are only 4 estates of over 100 acres in area. The climate of this State is not so suitable for rubber as the southern portion of the Peninsula, and growth and yields are less satisfactory.

The area under coconuts is approximately 3,830 acres.

There is no large scale cultivation of crops other than those mentioned above but tobacco, coffee, bananas, chillies, arecanuts, and groundnuts are cultivated on a small scale, and the cultivation of foodstuffs and vegetables for direct consumption has recently increased owing to the low prices of other agricultural products.

The following are details of the quantities of these commodities exported during the last five years:—

	Rice.	Padi.	Rubber.	Coconuts.
	Tons.	Tons.	Tons.	Tons.
A.H.1348	366	956	310	176
„ 1349	691	3,348	232	136
„ 1350	1,916	9,905	157	34
„ 1351	5,779	9,517	160	83
„ 1352	4,597	7,543	427	185

2. FORESTS.

There is not much forest of economic value in the State.

3. ANIMAL HUSBANDRY.

Buffaloes and bullocks are generally used for padi cultivation and stock is replaced by imports from Siam where cattle are bred extensively.

There is a considerable export of ducks and chickens and their eggs but the breeding of poultry is done in the haphazard fashion common in the Peninsula. It is hoped through the influence of the Co-operative Societies to secure an improvement in the quality of chickens and eggs.

4. MINERALS.

A geological survey of the State was carried out in 1913 by Mr. J. B. Scrivenor, Geologist, Federated Malay States, and in addition to tin-ore he found indications of the probable existence of oil and coal.

The Federated Malay States Railways have carried out oil-boring operations at Padang Besar on the Siamese frontier but no oil was discovered.

Tin-ore is found in a series of limestone hills forming the north-west boundary of the State. It is found in caverns and underground streams in these hills where it has been deposited in pockets in the course of centuries. Most of these deposits have a high tin-ore content. There is no

prospecting in the ordinary sense of the word. Mining and prospecting are practically synonymous terms. It is impossible to form any opinion as to the extent of these tin deposits. All the more easily accessible deposits have been worked out and the recovery of tin is becoming more difficult and expensive.

Exports have been :—

<i>Year.</i>	<i>Tons.</i>
A.H. 1348	555
„ 1349	428
„ 1350	372
„ 1351	638
„ 1352	427

5. FISHERIES.

The fishing industry is not on a very large scale. The industry is almost entirely in the hands of Malays.

The quantities of fish exported during recent years, chiefly to Penang, were as follows :—

	<i>Tons</i>
A.H. 1348 ...	176
„ 1349 ...	156
„ 1350 ...	452
„ 1351 ...	293
„ 1352 ...	289

B.

FOOD SUPPLIES.

The State is at present self-supporting in rice, fish, and poultry, the staple food-stuffs. The only food-stuff of any importance which has to be imported is sugar of which the imports in A.H.1352 amounted to approximately 600 tons.

VI.—Industry.

There are no local industries of a manufacturing nature.

VII.—Other Economic Activities.

Entrepôt trade and tourist traffic are non-existent and there is little prospect of their development.

VIII.—Communications.

There is communication by sea with Penang by junk. There is no steamship service. Motor boats run fairly frequently to the Kedah River and Setul on the Siamese coast.

The Federated Malay States Railway main line from Penang to Bangkok runs through the State from south to north, and at Padang Besar, the frontier station, there is a railway station operated jointly by the Federated Malay States Railways and the Siamese State Railways. There are 23 miles of railway in Perlis.

There are 37½ miles of metalled road and 26½ miles of gravelled road in the State. Kangar is 35 miles by road from Alor Star, the capital of the State of Kedah, from whence there is an excellent road to Butterworth and the south.

IX.—Tariff.

Duties are levied on a comparatively short list of imports. Specific duties are charged on liquors, tobacco, petroleum, and sugar (from which articles most of the Customs revenue is obtained) and also on some other food-stuffs and on rubber boots and shoes. *Ad valorem* duties are charged on other articles at rates generally not exceeding 20 per cent. The tariff provides for preferential rates or free entry for all imports of Empire origin, except matches, methylated spirit, petrol, sugar, and certain liquors.

X.—Trade Representatives.

No trade representatives abroad are maintained by the Perlis Government, but inquiries about the State are dealt with in the United Kingdom by the Malayan Information Agency, 57, Charing Cross, London, S.W.1. There are no overseas trade representatives in Perlis but the State falls within the sphere of His Majesty's Trade Commissioner at Singapore.

TRENGGANU.

I.—Situation, etc.

Trengganu, a Malay State under British protection, is situated on the east coast of the Malay Peninsula. It is bounded by Kelantan on the north and north-west, by Pahang on the south and south-west and by the China Sea on the east.

The north-east monsoon, lasting from November to March, makes a distinct meteorological change in respect of temperature, wind, and rainfall. The rainfall chart shows a sharp rise in November and an abrupt fall early in the year. The average annual rainfall is about 120 inches. The highest maximum temperature recorded in 1933 was 92° F. on 28th May, and the lowest 73° F. on 5th December. The highest minimum temperature recorded was 77° F. on 13th January, 1933, the lowest 66° F. on several occasions during February.

The total area of the State is computed to be about 5,000 square miles.

All land not held under title or by concession is called State land.

Alienated land is held by title under the Land Enactment No. 5 of A.H. 1344 or under the Settlement Enactment No. 4. of A.H. 1351. On 1st of January, 1933, there had been recorded 100,613 claims to land in respect of 107,239 acres. On 31st of December, 1933, there were 172,494 acres of agricultural land under cultivation.

II.—Population.

The population recorded at the census of 1931 was :—

Malays	...	...	...	...	...	163,995
Other Malaysians	...	...	...	...	...	669
Chinese	...	...	...	...	...	13,154
Indians	...	...	...	...	...	1,371
Europeans	...	...	...	...	...	35
Others	...	...	...	...	...	565
						179,789

Of these 92,354 were males and 87,435 females, giving a sex-ratio of 947 females per 1,000 males. 12·4 per cent. of the population was urban (living in towns of 1,000 inhabitants or more) and the largest town, Kuala Trengganu, had a population of 13,991.

The estimated population as at 31st December, 1933, was 187,688.

The occupied population was classified industrially as follows :—

Agriculture	...	...	...	...	...	44,851
Fishing	...	...	...	...	...	10,407
Mining and manufactures	...	...	...	...	...	9,959
Transport and commerce	...	...	...	...	...	7,737
Public service and professions	...	...	...	...	...	1,323
Personal service	...	...	...	...	...	2,534
						76,811

Unlike most of Malaya, Trengganu has only a small immigrant population (mainly Chinese) and at the 1931 census the proportion of the population born outside Malaya was only 7·3 per cent. There is fairly frequent movement backward and forward; no statistics are kept of local emigration and immigration, but there has been some increase in immigration since 1921 when the proportion of "non-Malaya born" was 4·4 per cent. During the decade the Chinese population increased from 7,246 to 13,254.

III.—Finance.

A. CURRENCY AND BANKING.

1. The currency in circulation is that of the Straits Settlements (\$1 Straits = 2s. 4d.).
2. There are no banks in the State.
3. The Government carries out no functions of a banking nature.

B. PUBLIC FINANCE.

1.—(a) There are no publicly-issued loans but at the end of 1933 the State owed the Government of the Straits Settlements the sum of \$4,177,996 (equivalent to £487,430) representing \$3,610,000 (equivalent to £421,167) principal sum borrowed at 4½ per cent. and \$567,966 (equivalent to £66,263) arrears of interest. These loans have no fixed term of redemption.

(b) The annual amount required for interest is \$187,555, equivalent to £21,881. There is no sinking fund.

2.—(A) Revenue (on basis of 1934 Estimates).

Self-Balancing Department.

	Revenue.	Expenditure.	Balance.
	\$	\$	\$
Posts and Telegraphs	22,960	23,614	—654

Deficit \$654.

General Revenue.

	\$	Percentage.
I. Land Revenue	97,650	9·0
II. Customs and Marine, i.e.—	\$	
Export Duties	328,310	
Import „	387,980	
Other	24,920	
	741,210	68·2
III. Chandu (opium)	123,000	11·3
IV. Excises, Licences, Fees, and other internal revenue...	77,680	7·2
V. Municipal	43,720	4·0
VI. Land Sales	3,300	0·3
	1,086,560*	100
*Equivalent to £126,765...		
Revenue of self-balancing Department set-off against		
Expenditure	22,960	
	\$1,109,520	

(B) *Analysis of Import Duties for 1933.*

It is not possible to give full details of the amount of import duty collected during 1933, but the following table shows the amount of duty collected on the principal items:—

	\$
Tobacco ...	140,393
Spirits ...	11,391
Petroleum ...	61,653
Matches ...	31,654

3. *Expenditure (on basis of 1934 Estimates).*

	\$	Percentage.
I. Deficit on self-balancing Department (see 2(A) above)	654	0.1
II. Public Debt	37,150	3.5
III. Administration	635,947	60.6
IV. Economic Development	93,574	8.9
V. Social Services, i.e.—	\$	
Education Department	38,100	
Medical Department	62,476	
Other	64,075	
	164,651	15.7
VI. Defence	—	—
VII. Pensions, Gratuities, Ruling House Allowances ...	117,671	11.2
Equivalent to £122,459... ..	1,049,647	100
Expenditure of self-balancing Department set off against Revenue	22,960	
	<u>\$1,072,607</u>	

4. *Reserve Funds, etc.*

The State has no reserve or other special funds.

5. *Grants-in-aid.*

The State has not received or asked for any grants-in-aid from the United Kingdom Exchequer. Loans have been obtained from the Straits Settlements Government as indicated above.

IV.—*Trade Statistics.*

Full trade statistics are not available.

The trade of Trengganu with non-Malayan countries is included in the general statistics for Malaya—see memorandum on the Straits Settlements.

EXPORTS.

(i) *Total Exports (including Bullion and Specie):—*

Year.	\$	£
1913	1,976,691	equivalent to 230,614
1930	4,219,727	„ 492,301
1931	3,689,970	„ 430,497
1932	3,965,825	„ 462,679
1933	4,570,747	„ 533,254

(ii) *Domestic Exports by Classes, 1933.*

	\$	£
Class I	825,582	equivalent to 96,318
Class II	2,934,709	„ 342,383
Class IV (Miscellaneous and Unclassified)	125,392	„ 14,629
	<u>3,885,683</u>	<u>453,330</u>

(iii) *Principal Domestic Exports, 1933.*

Article.	Total Quantity	Total Value in \$	Total Value in £
<i>Class I.</i>			
Fish (dried)...	4,630 tons	702,266	81,931
Arecanuts ...	1,065 „	92,588	10,802
Blachan (fish paste)	3,169 cwt.	26,653	3,109
<i>Class II.</i>			
Iron-ore ...	357,833 tons	1,510,867	176,268
Rubber ...	49,120 cwt.	577,715	67,400
Tin-ore ...	350 tons	403,596	47,086
Copra ...	1,891 „	159,730	18,635
Timber ...	4,866 „	86,131	10,049
Manganese ...	10,327 „	82,500	9,625
Gambier ...	1,195 cwt.	25,946	3,027

IMPORTS.

(i) *Total Imports (including Bullion and Specie):—*

					\$		£
1913	...	...	...	...	1,217,892	equivalent to	142,064
1930	...	...	...	...	3,971,099	"	463,295
1931	...	...	...	...	3,028,906	"	353,372
1932	...	...	...	...	3,128,765	"	365,022
1933	...	...	...	...	2,693,951	"	314,294

(ii) *Imports by Classes, 1933.*

					\$		£
Class I	...	...	...	...	1,568,577	equivalent to	183,000
Class II	...	...	...	...	195,154	"	22,768
Class III	...	...	...	...	874,446	"	102,019
Class IV	...	...	...	...	54,874	"	6,402
					2,693,051	"	314,189

In addition there were imports of bullion and specie, to the value of \$900 equivalent to £105.

(iii) *Principal Imports, 1933.*

Article.	Total Quantity.	Total value in \$	Total value in £
<i>Class I.</i>			
Rice	22,294 tons	1,038,453	121,153
Sugar	1,058 "	81,766	9,538
Milk	5,888 cases	50,011	5,835
Coffee	2,089 cwt.	38,010	4,434
Liquors	25,735 gal.	17,462	2,037
Vegetables	309 tons	12,119	1,414
Salt	3,455 "	11,196	1,306
<i>Class II.</i>			
Groundnut and coconut oil	1,857 cwt.	22,217	2,592
<i>Class III.</i>			
Cotton and artificial silk piece-goods	559,861 yd.	245,310	28,620
Petroleum	14,257 gal.	92,953	10,844
Motor Spirit	75,597 "	43,695	5,098

V.—Natural Resources.

A.

1. AGRICULTURE.

Agriculture is the principal economic activity of the State and is carried on predominantly by Malay small-holders, there being only two European-owned estates. Much of the production is of food-stuffs and other products for consumption by the grower or sale in local markets, and the most important single crop is rice, which is wholly consumed in Trengganu. Some crops are, however, grown for export and these will be dealt with first.

Rubber.—Over 50,000 acres of land have been planted with rubber, of these a small proportion only consists of estates under 10 acres. As a result of the introduction of rubber regulation more detailed statistics are being prepared. All the rubber is planted on virgin soil and where maintenance has been adequate the average output is high. Tapping is restricted during the period of the north-east monsoon, i.e., November to February, but otherwise conditions are very favourable. For economic reasons large areas went out of tapping during the last three years, but with the increase in the price of the commodity they are all now producing. There is a distinct shortage of labour in some districts on account of the difficulty of access, but this is righting itself slowly. Exports for the past 5 years have been:—

Year.	Tons.	\$
1929 ...	2,317	1,722,551
1930 ...	1,997	933,464
1931 ...	1,862	415,667
1932 ...	1,818	277,160
1933 ...	2,456	577,715

Coconuts.—There is only one estate manufacturing copra of a good standard, the product of the small-holder being of very poor quality. No attempt has so far been made to improve this trade owing partly to the lack of staff and to the very poor price at present obtainable. Production of copra by the small-holder presents more difficulty on this coast than on the western coast and it is not anticipated that it will ever become a flourishing trade except for large estates. Exports in recent years have been:—

			Tons.	\$
Mohammedan years	{ 1348	...	2,109	343,724
	1349	...	1,875	239,187
	1931	...	1,622	132,608
	1932	...	1,071	88,168
	1933	...	1,890	159,730

Arecanuts are similarly grown extensively and largely consumed locally. Exports have been:—

			<i>Tons.</i>	\$	
Mohammedan years	{	1348	...	724	192,599
		1349	...	786	212,646
		1931	...	818	207,982
		1932	...	576	111,805
		1933	...	1,065	92,588

Gambier is also produced both for local use and for export. Exports have been:—

			<i>Tons.</i>	\$	
Mohammedan years	{	1348	...	72	37,829
		1349	...	91	58,510
		1931	...	92	42,895
		1932	...	63	31,972
		1933	...	60	25,946

Rice.—Some 38,000 persons (practically all Malays) were employed in rice cultivation at the census of 1931. In 1932-33 there were about 36,000 acres under wet rice and 14,500 acres under dry rice. The crop was about 5½ million gantangs (gallons) of padi yielding approximately 9,500 tons of rice. Efforts are being made to increase cultivation and improve yields, but the State is not at present self-supporting in rice, net imports amounting to 13,430 tons in 1932 and 11,500 tons in 1933.

Many other food crops are grown, e.g., sweet potatoes, bananas, and other fruits, vegetables, and pulses.

The State is the centre of a considerable transshipment trade of padi from Siam on its way to Singapore, over half the amount imported being re-exported. The value of this trade in 1933 was over half a million dollars.

2. FORESTS.

The forests of Trengganu are of considerable value, but exploitation on any large scale has not been encouraged as there is at present no Forests Department in the State and consequently no safeguard against wasteful working methods.

The most plentiful hard woods are those of the *resak* (*Vaticca spp.*) group, while *chengal* (*balanocarpus heimii*) and *merbau* (*intsia spp.*) also occur. The most important local timber from an economic point of view is *kapur* (*dryobalanops aromatica*), a semi-hard wood, for which there is a good export market. For soft woods Trengganu forests are believed to compare favourably with any in Malaya. *Meranti* (*shorea spp.*) and *keruing* (*dipterocarpus spp.*) are found in equal abundance throughout the State.

There is no charcoal industry on any appreciable scale.

The quantities and values of timber exported in 1931, 1932 and 1933 were:—

			1931.		1932.		1933.	
			Tons.	Value.	Tons.	Value.	Tons.	Value.
				\$		\$		\$
Round timber	...	...	2,514·6	58,368	1,754·48	26,578	1,468·14	20,339
Converted timber	...	...	4,599·2	122,341	1,882·43	49,988	3,397·95	65,792
			<u>7,113·8</u>	<u>\$180,709</u>	<u>3,636·91</u>	<u>\$76,566</u>	<u>4,866·09</u>	<u>\$86,131</u>

3. ANIMAL HUSBANDRY.

It is estimated that there were in the State in 1933 20,250 buffaloes, 22,600 cattle, 4,500 pigs, 2,600 sheep, 5,700 goats, and 228,000 poultry.

The export trade in live-stock is small; Malays rear cattle and buffaloes for draught work in the rice fields, and sheep and goats for their own consumption. Pigs reared by Chinese are for the most part sold in the local market, as also is poultry.

Imports and exports in 1933 were as follows:—

	Imports.	Exports.		Imports.	Exports.
	Number.	Number.		Number.	Number.
Buffaloes	—	3	Sheep	62	—
Cattle	—	133	Goats	41	43
Pigs	111	232	Poultry	539	809

4. MINERAL.

The State contains important deposits of tin, iron, wolfram, and manganese, as well as other minerals.

Tin.—The northern part of the eastern tin belt of the Peninsula is in Trengganu, in the districts south of Kuala Trengganu. As the country has been well prospected by both Chinese and Europeans, no large new areas are likely to be found, but there are several places where small deposits may be found. Production is at present regulated in accordance with the International Tin Regulation Scheme. Exports during the last five years calculated in actual weight of tin ore (metallic content 72 per cent.) have been:—

			<i>Tons.</i>	<i>Value.</i>				<i>Tons.</i>	<i>Value.</i>
				\$					\$
1929	...	...	1,339	1,607,220	1932	...	...	556	444,016
1930	...	...	1,025	906,833	1933	...	...	350	403,596
1931	...	...	684	472,190					

All exports go to Singapore for smelting.

Iron.—Extensive haematite deposits are known and some of them are worked by Japanese. All the exports go to Japan. Iron also occurs in many smaller deposits, e.g., in conjunction with tin; in limonite deposits of to low a grade to work; and in pyrite deposits, which contain too large a proportion of sulphur to permit of profitable working.

Exports in recent years have been :—

		<i>Tons.</i>	<i>Value.</i> \$			<i>Tons.</i>	<i>Value.</i> \$
1929	...	55,150	278,142	1932	...	203,105	855,839
1930	...	87,364	436,750	1933	...	357,833	1,501,867
1931	...	203,109	870,995				

It will be seen that production is on the increase and the industry has good prospects.

Tungsten.—Two large deposits of wolfram exist at Chendrong, Ulu Kemaman, and Bukit Lentor, Ulu Dungun. Scheelite was formerly found at Chendrong but is no longer found. Both mines have yielded rich ores and during the war were flourishing, but the Ulu Dungun mine ceased working after the war. No systematic prospecting has been done but there should be considerable reserves of ore left. Exports (all going to Singapore) in recent years have been :—

		<i>Cwt.</i>	<i>Value</i> \$			<i>Cwt.</i>	<i>Value</i> \$
1929	...	1,421	23,882	1932	...	620	10,422
1930	...	867	14,560	1933	...	480	9,159
1931	...	465	7,808				

Manganese.—The principal mine is at Machang Sa-tahun. Exports (which go to Japan) in recent years have been :—

		<i>Tons.</i>	<i>Value</i> \$			<i>Tons.</i>	<i>Value</i> \$
1929	...	32,726	257,781	1932	...	9,228	73,824
1930	...	20,696	165,569	1933	...	10,327	82,500
1931	...	8,848	70,784				

Other Minerals of which deposits occur include lead, zinc, gold, monazite, and sulphur (in the Bandi "Sulphur Bar") but the deposits are not at present worth working. There are also useful supplies of granite for building and road-metal, coral, from which lime could be manufactured, and small deposits of brick and china clay.

5. FISHERIES.

Fishing provides a livelihood for almost all the Malays who live on the coast, and, at the census of 1931, was the occupation of over 10,000 persons. Figures are not available on which to base an estimate of the number so employed at the end of 1933, but there is no reason to suppose that the number has fallen since 1931. The financial and marketing side of the industry is mainly controlled by Chinese. Deep-sea fishing by drift-nets, off-shore fishing by drag-nets, and line fishing from small boats are all extensively practised from April to October, but the north-east monsoon precludes the possibility of any continuous fishing from November to March or the establishment of the large staked fish-traps common on the west coast of the Peninsula. The quantity of fish caught is vastly in excess of the local needs and fish forms one of the principal exports of the State. No refrigerating system exists, and consequently the fish has to be exported in dried form, either sun-dried or cooked. The fish is packed for export in bamboo containers called *jak* or in wooden cases. There is also a fair quantity of shrimp paste, known as *blachan*, exported. During the past year it was found that, as in 1932, the Trengganu dried fish was fetching a lower price in the Singapore market than dried fish from elsewhere. This was stated to be the result of unsatisfactory methods of drying and packing, which gave the fish a poor appearance on arrival in the market. Measures are being continued to raise the standard of the work of preparing fish for export.

The exports of marine produce for the past five years were as follows :—

		<i>Dried Fish.</i>		<i>Blachan</i>		<i>Other Marine Produce.</i>	
		<i>Quantity.</i> <i>Tons.</i>	<i>Value.</i> \$	<i>Quantity.</i> <i>Cwt.</i>	<i>Value.</i> \$	<i>Quantity.</i> <i>Cwt.</i>	<i>Value.</i> \$
1929	...	11,720	1,186,401	1,469	12,672	1,034	19,141
1930	...	7,758	1,329,201	461	5,338	405	11,947
1931	...	6,786	779,994	2,918	20,764	431	5,883
1932	...	6,929	855,059	3,896	25,976	2,407	21,894
1933	...	4,630	702,266	3,169	26,653	6,488	54,772

FOOD SUPPLIES.

The State is not at the present time self-supporting in food-stuffs. The most important article imported is rice of which there was a net import in 1933 of 11,500 tons as compared with 13,430 tons in 1932. In time it may be possible to produce the rice locally but there is at present no possibility of the State dispensing with its imports of sugar, tinned milk, flour, and other articles of which the local production is impossible.

VI.—Industry.

Of industry, in the commonly accepted term, there is practically none. At Kemaman there is a Chinese-owned saw-mill which in 1933 exported 3,398 tons of converted timber valued at \$65,792 and there are a few small licensed *samsu* distilleries. There is a fairly large output of handmade silk and cotton sarongs and also tembaga puteh (white brass) ware; and there is a small export of these articles.

VII.—Other Economic Activities.

Entrepôt trade and tourist traffic are of no importance in Trengganu.

VIII.—Communications

Trengganu has the comparatively long coast line of 140 miles. The principal ports are Chukai (Kemaman) in the south, Kuala Trengganu in the centre, and Kuala Besut in the north. Local coasting steamers can enter the river at Chukai (Kemaman) and Kuala Trengganu at high tide all the year round, though during the north-east monsoon season (November to March) the entrance into the harbour over the sand bar at the mouth of the Trengganu River is often exceedingly difficult. At Kuala Besut, and at the other lesser ports at which coasting steamers call, viz., Kijal, Kemasek, Kretir, Paka, Dungun, Batu Rakit, and Setiyu, there is no protected anchorage and during the north-east monsoon season the landing and loading of cargo by lighters are frequently impracticable.

The only ocean-going steamers that call are vessels from Japan which visit Kemaman and Dungun for the transport to Japan of the iron-ore which is brought down by river from the mines inland.

There is a road to the north from Kuala Trengganu which connects the State with the Federated Malay States railway system at Kuala Krai in Kelantan. This road was completed in 1931 and as it is for the greater part only an earth formation which cannot stand continuous traffic in wet weather, it has been necessary for the last two years to close it for most of the period November to March. A start was, however, made towards the end of 1933 on repairs which should render the road usable all the year round except under the worst weather conditions. This will be a great benefit to the State as there is no land exit to the south and communications with the outside world have hitherto been difficult and unreliable for about a third of the year.

The State possesses 145 miles of roads in all, of which 34 miles are lightly metalled (13 miles having a bituminous coating), 55 miles are gravelled, and 56 miles are earth formation. On all the public roads motor-cars ply for hire, and on all but one section of 25 miles lorries and light motor-buses are allowed.

Transport services are all privately owned, controlled, and financed.

There is no railway in the State and there are no air communications.

IX.—Tariff.

Duties are levied on a fairly extensive list of imports. Specific duties are charged on liquors, tobacco, matches, petrol, sugar, and a number of other food-stuffs, rubber boots and shoes, and a few other articles. On the remainder there are *ad valorem* duties, generally not exceeding 20 per cent. On cotton piece-goods there are alternative specific and *ad valorem* duties, whichever is the higher being charged. The tariff provides for preferential rates or free entry for a number of imports of Empire origin.

X.—Trade Representatives.

No trade representatives abroad are maintained by the State but inquiries relating to it are dealt with in the United Kingdom by the Malayan Information Agency, Malaya House, 57, Charing Cross, London, S.W.1.

There are no overseas trade representatives in Trengganu but the State falls within the sphere of His Majesty's Trade Commissioner at Singapore.

BRUNEI.

I.—Situation, etc.

The State of Brunei is situated on the north coast of the island of Borneo, being bounded on the west and south by Sarawak and on the east by the State of North Borneo. It comprises an area of about 2,500 square miles with a coast line of about 100 miles, and lies between latitude 4° and 5° North and longitude 114° and 115° East. Brunei Town is 758 miles from Singapore.

All land not held under title or by concession is called State land and the Resident may dispose of it on behalf of the Sultan in accordance with the Land Code, 1909.

Alienated land is held either in perpetuity or for a number of years by entry in the Land Office Register. The title covers surface rights only and is subject to certain reservations in favour of the Government, such as the right to all minerals and to resume for public purposes on payment of compensation.

The area in private occupation at the end of 1933 was roughly 179,000 acres. There were about 4,200 small-holdings.

The climate is pleasant and healthy without any marked changes of temperature. During the day the temperature lies between 80° and 90° F., generally with a light breeze. At night the temperature always falls below 80° F.

In 1933 the highest monthly maximum was 86.58° F. in August and the lowest monthly maximum was 85.64° F. in February. The lowest monthly minimum was 75.61° F. in October and the highest monthly minimum was 76.77° F. in June.

The average rainfall varies between 100 and 200 inches annually for different parts of the State.

In 1933 the lowest annual total was 162.80 inches at Batu Apoi and the highest 202.23 inches at Labu.

II.—Population, etc.

The population as given in the 1931 census and the estimated population at the 31st December, 1933, was as follows:—

	1931 Census.	1933 Estimate.
Europeans	60	90
Eurasians	16	30
Malays	26,972	28,000
Chinese	2,683	4,280
Indians	377	200
Others	33	300
	<u>30,135</u>	<u>32,900</u>

The population on the whole shows a tendency to increase.

The Chinese and Indian communities are of course the result of immigration, and the rubber slump has caused a slight outward movement especially among Indians.

The opening up of the oil-field in Kuala Belait has, however, again encouraged immigrant labour and Chinese especially tend to increase.

The principal occupations of the native inhabitants are fishing and agriculture. Large numbers are also employed in Government Service and by European-owned companies.

The immigrant labour is chiefly employed on the oil-field at Kuala Belait.

Trade is almost entirely in the hands of Chinese.

The approximate number of persons employed in various pursuits is as follows:—

Agriculture	9,250	Public service	150
Mining and manufacture	1,700	Professions	60
Transport	250	Personal service	500
Commerce	700		

III.—Finance.

A. CURRENCY AND BANKING.

1. The currency in circulation is that of the Straits Settlements. (\$1 = 2s. 4d.)
2. There are no banks in the State.
3. The Government carries out no functions of a banking nature, except that secured loans up to small amounts are occasionally granted in special cases.

B. PUBLIC FINANCE.

1. There is no publicly-issued debt but a loan of \$383,000 (equivalent to £44,683) from the Federated Malay States was outstanding at the 31st of December, 1933.

The interest payable, at 4 per cent., is \$15,320 per annum.

The loan is not repayable at a fixed date but is being repaid by instalments of \$4,000 per annum.

2.—(A) *Analysis of Revenue on the basis of the Estimates for 1934.**Self-balancing Department.*

						<i>Posts and Telegraphs.</i>	
						\$	
Revenue						10,000	
Expenditure						21,170	
Deficit						<u>\$11,170</u>	
						<i>General Revenue.</i>	
						\$	Percentage.
I. Land Revenue						254,600	45.6
II. Customs, i.e.—						\$	
Export Duties				9,000			
Import Duties				180,500			
						189,500	33.9
III. Opium Monopoly						45,000	8.0
IV. Other Revenue						69,900	12.5
						<u>559,000*</u>	100
* Equivalent to £85,217.							
Revenue of self-balancing Department set-off against							
Expenditure						10,000	
						<u>\$569,000</u>	

2.—(B) *Analysis of Import Duties for 1933.*

				\$
Class I				118,396
Class II				6,897
Class III				21,745
Class IV				18,779
				<u>165,817</u>

Total Customs Duty \$178,266.

No record is available to show how much of this revenue was from Empire goods and how much from foreign goods.

3.—*Analysis of Expenditure on basis of Estimates for 1934.*

	\$	Percentage.
I. Deficit on self-balancing Department	11,170	2·2
II. Debt Charges... ..	20,121	4·0
III. Administration	244,886	48·2
IV. Economic Development	93,960	18·5
V. Social Services, i.e.—		
Education Department... ..	12,756	•
Medical Department	38,337	
Other	71,404	
	122,497	23·9
VI. Defence	—	—
VII. Pensions, etc.	16,330	3·2
	508,964*	100
* Equivalent to £59,379.		
Expenditure of self-balancing Department set-off against Revenue	10,000	
	<u>\$518,964</u>	

4.—RESERVE FUNDS, ETC.

The Brunei Government has an Opium Revenue Replacement Fund (for use in the event of the disappearance of the opium revenue, if and when it becomes possible to suppress opium smoking) amounting at 31st December, 1933, to \$92,305. At the same date it had an excess of general assets over liabilities (excluding the loans from the Straits Settlements and Federated Malay States Governments mentioned above) of \$264,755, of which \$68,550 was invested and \$150,880 held in cash.

5.—GRANTS-IN-AID.

Between 1917 and 1928 inclusive a sum of \$5,145 per annum (£600 approximately) was contributed from Imperial Funds.

IV.—Trade Statistics.

It is not possible, from the information available, to give details regarding the places of origin of the imports or the destination of the exports. Almost all the trade is conducted through Labuan and Singapore.

Year.	Imports. £	Exports. £	Year.	Imports. £	Exports. £
1913	15,215	51,044	1932	283,529	175,870
1930	295,916	94,202	1933	281,373	255,621
1931	255,910	58,508			

Trade by Classes, 1933.

	Class I.	Class II.	Class III.	Class IV. (Bullion and Specie).	Grand Total.
	£	£	£	£	£
Imports	65,081	10,764	163,457	42,071	281,373
Exports	4,324	250,099	1,198	—	255,621

Principal Imports, 1933.

Articles.	Value. £	Articles.	Value. £
Machinery	96,373	Sugar	5,684
Provisions	21,105	Motor Vehicles	4,229
Rice	12,428	Cement	3,880
Tobacco	11,349	Milk	3,579
Dyed Cotton Goods	8,869	Spirits	3,555
Petroleum	7,541	Sarongs	2,623

Principal Exports, 1933.

Articles.	Value. £	Articles.	Value. £
Crude Mineral Oil	205,434	Prawns	3,652
Plantation Rubber	27,562	Jelutong	2,242
Cutch	14,438		

V.—Natural Resources.

A.

1.—AGRICULTURE.

The chief agricultural products of the State are rubber, sago, and rice.

Rubber.—The area under rubber is estimated at about 9,000 acres, of which some 4,000 acres belong to European companies and the remainder to Asiatic small-holders. The labour employed is mostly local.

Owing to the low price of rubber many trees were left untapped in 1932.

Exports of rubber were as follows:—

					<i>Tons.</i>	<i>\$</i>
1929	...	...	...	...	1,027	742,999
1930	...	...	...	...	870	377,927
1931	...	...	...	...	725	161,204
1932	...	...	...	...	658	104,899
1933	...	...	...	...	1,013	236,249

Sago.*—Sago is one of the staple foods of the local population and is grown more for local consumption than for export. It is a purely native crop. The area under cultivation is roughly 5,000 acres.

Exports were as follows:—

					<i>Cwt.</i>	<i>\$</i>
1929	...	...	...	...	3,751	13,000
1930	...	...	...	...	6,471	21,481
1931	...	...	...	...	2,620	3,485
1932	...	...	...	...	6,178	8,568
1933	...	...	...	...	6,077	4,524

Rice.—There are large areas of land suitable for padi-growing throughout the State and, with the fall in the price of other products, and the recent improvements in road communication, it may be anticipated that this form of cultivation will increase, as in fact it has in the last three years.

Hill padi cultivation, which used to be the favourite form of cultivation, is now being replaced by wet padi cultivation.

The following table shows the approximate areas under dry and wet padi respectively for the past five years:—

			<i>Dry</i>	<i>Wet</i>	<i>Total</i>
			<i>Acres.</i>	<i>Acres.</i>	<i>Acres.</i>
1929	...	...	4,000	1,200	5,200
1930	...	...	4,600	2,900	7,500
1931	...	...	3,900	3,500	7,400
1932	...	...	7,000	5,000	12,000
1933	...	...	4,835	3,420	8,255

The total production of padi in recent years has been:—

			<i>Gallons.*</i>			<i>Gallons.*</i>
1929	...	...	494,000	1931	...	760,016
1930	...	...	500,877	1932	...	991,223
				1933	...	1,023,960

All rice cultivation is in native hands, the cultivators being mainly Kedayans.

2.—FORESTRY.

As a result of a favourable report on the forests of Brunei made in 1932 by an officer of the Malayan Forest Service it was decided to start a Forest Department in the State of Brunei. In March, 1933, an officer was seconded from the Federated Malay States with two subordinates. The first year was employed in framing legislation to control forest working and in exploration of the forest resources of the State.

The most valuable timbers found in the State are *meranti*, *kapur*, *resak*, *keruing*, *merawan*, *medang tebak*, *terantum*, *ramin*, *belian*, *kelat*, *kempas*, *merbau*, *rengas*, *bintangor*, and *jelutong*.

Jelutong.—For some years the local jelutong trade was of great importance but bad tapping methods has caused such heavy mortality in the crop that it was becoming increasingly difficult to work it economically. Enumerations showed that at least 75 per cent. of the original crop had perished so that it had become necessary to tap more and more drastically to obtain a profitable yield of latex. Furthermore it was found by experiment that trees which had been maltreated could not be persuaded to give an economic yield of latex by any reasonable conservative tapping method. It was therefore decided to close down a portion of the jelutong area and to concentrate in the other portion on raising the quality of the finished product which had heretofore been remarkably poor. The idea was taken up enthusiastically by the workers and towards the end of the year a gratifying increase in prices was recorded.

All jelutong is now classed for the purpose of assessing export duty as first-class jelutong. This will serve to encourage proper refining methods.

It must be admitted that the new methods of assessment caused a fall in revenue at first as many minor traders stopped work. This, however, will be all to the good of the trade in future as only traders of substance using proper methods will undertake the work.

Total exports for the last five years were:—

				<i>Tons.</i>	<i>Value.</i>
					<i>\$</i>
1929	...	...	...	793	165,120
1930	...	...	...	473	68,922
1931	...	...	...	251	27,928
1932	...	...	...	297	32,773
1933	...	...	...	116	19,215

The total revenue derived from Forest Licences in 1933 was \$3,748 as against \$4,965 in 1932 and \$3,173 in 1931.

* The local unit of measure is the *gantang* equivalent to a gallon.

3.—ANIMAL HUSBANDRY.

Animal husbandry is of negligible importance. Buffaloes are generally used for cultivation; the Chinese keep pigs and it is really only in these that any trade takes place. The only market for animal products is Singapore and very small consignments of such articles as hides and tallow are sent there. It is unlikely that any large industry in animal products will develop in the near future.

4.—MINERALS.

Mineral oil has been discovered in several parts of the State in recent years and has now become its most important export. The first discovery was at Labi in the Belait District in 1924, but this field was disappointing and was finally abandoned in 1931 by the British Malayan Petroleum Company, Limited, which had obtained a lease of it in 1924.

Prospecting was also carried on in the coastal area of the Belait District and in April, 1929, oil was found at Seria about 10 miles north-east of Kuala Belait where the headquarters of the Company are situated. It soon became apparent that a commercial oil-field that might rival that of Miri in Sarawak had been discovered and great progress was made in 1930 and 1931 in testing the extent of the field and developing it for production. In 1932 a pipe-line from Seria to the refinery at Lutong in Sarawak territory was completed and production was commenced during the first quarter.

This has been steadily increased and the royalties received by the State during 1933 were \$230,000.

Chinese, Malay, and Indian labour is employed. The Chinese are mainly on contract and the other races on daily wages.

Exports for the last four years have been as follows:—

Year.	Tons.	\$
1930	—	—
1931	4,326	26,864
1932	176,275	1,094,663
1933	280,523	1,760,861

Coal.—Coal is known to exist in the State of Brunei and seams at Muara were worked for over 25 years by the Rajah of Sarawak.

Since that date various syndicates have been interested but their inability to attract sufficient capital has brought their efforts to nought.

In 1931 a report on the chances of developing Brunei coal was made by a geologist of the Federated Malay States Mines Department. He formed the opinion that the development of Brunei coal would be very expensive and difficult owing to the peculiar nature of the seams.

The Syndicate that were negotiating at the beginning of the year found themselves unable to accept the conditions laid down by Government and no interest is now being shown by any Company.

Mining by native methods has been carried out for some years on a small scale but much of this coal is consumed locally. Exports for the last five years have been as follows:—

Year.	Tons.	\$
1929	—	—
1930	—	—
1931	57	330
1932	168	1,750
1933	78	618

5.—FISHERIES.

Fishing provides a livelihood for a number of natives. There is a ready market for fresh fish locally, and a flourishing industry in dried prawns for export. The amount of exports fluctuates with the size of the catch. The industry is financed by Chinese, who employ Brunei fishermen. Exports for the last five years have been as follows:—

Year.	Tons.	\$
1929	124	54,376
1930	65	53,553
1931	57	46,657
1932	64	46,114
1933	62	31,306

B.

FOOD SUPPLY.

The State is not at the present time self-supporting in foodstuffs. The most important article imported is rice, of which annual imports vary from about 1,500 to 3,000 tons. Given time, it may be possible to produce the rice locally.

This will require careful organization and cultivators of a good type must be encouraged to immigrate from other countries. The number of agriculturists at present available is insufficient to make the State self-supporting.

There is no present prospect of the State's dispensing with its imports of sugar, canned milk, flour, and other articles of which the local production is impossible.

VI.—Industry.

Brunei is a State with a comparatively long history and there are several well-established local industries, some of considerable antiquity.

The most important of these is the production of *cutch*, a tanning material extracted from the bark of certain trees. The factory belongs to the Island Trading Company, Limited, which employs almost exclusively native Brunei labour.

Most of the bark comes from areas outside the State, but areas which have not yet been worked are known to exist in the Belait District.

Recent exports have been :—

				Quantity in tons.	Value in \$.
1929	...	...	...	2,104	185,802
1930	...	...	...	2,994	220,080
1931	...	...	...	2,824	194,922
1932	...	...	...	2,833	195,465
1933	...	...	...	1,788	123,757

The other chief industries are of the "Arts and Crafts" variety.

The Brunei silversmiths are probably the best known in the Malay Archipelago, and there is a small but steady demand for their silverware, exports being valued at rather over \$1,000 a year.

Brassware is mostly sold to other States in Borneo, but not in large quantities. The smiths can copy accurately parts of European machinery as well as producing the ordinary brassware.

The Brunei women are expert at weaving cotton and a few silk sarongs, table-cloths, and similar articles. The industry is being severely restricted by the competition of cheaper machine-made articles.

VII.—Other Economic Activities.

Entrepôt trade and tourist traffic are non-existent in Brunei.

VIII.—Communications.

Internal communications in the State are at present somewhat rudimentary. There are practically no metalled roads but earth roads are being opened up in various directions, both between towns within the State and also between towns within the State and neighbouring towns in Sarawak. These roads are usually fit for motor traffic and a regular weekly Government mail service runs between Brunei Town and Kuala Belait.

River and sea communications are better developed; more or less regular motor-launch services are maintained between Brunei Town and the up-river Districts and between Kuala Belait and Labuan and the rivers are largely used as means of communication by native craft.

Until 1932 external communications were maintained with Labuan only.

Brunei Town is situated some way up the river and can be reached by steamers drawing up to 12 feet except at times of very low tide, but the river is not free from navigational difficulties. The Straits Steamship Company, Limited's motor vessel *Brunei* maintains a regular service between Brunei and Labuan and makes occasional calls at Kuala Belait.

In 1932 arrangements were made for the Sarawak Steamship Company, Limited's vessel *Auby* to maintain a three-weekly direct service with Singapore, calling both at Brunei and Kuala Belait. These arrangements continued during 1933.

IX.—Tariff.

Customs duties are levied on most imports. The duties are for the most part *ad valorem* at comparatively low rates. There are few specific duties. The tariff provides for preferential duties on many articles of British origin.

X.—Trade Representatives.

No trade representatives abroad are maintained by the Brunei Government but inquiries relating to the State are dealt with in the United Kingdom by the Malayan Information Agency, Malaya House, 57, Charing Cross, London, S.W.1.

THE STATE OF NORTH BORNEO.

I.—Situation, etc.

The State of North Borneo occupies the northern portion of the island of Borneo. It is bounded on the south-west by Sarawak and on the south and south-east by Dutch territory. An independent State, it is governed and administered by the British North Borneo Company. Incorporated in 1881 by Royal Charter—which *inter alia* vested in the Secretary of State for the Colonies certain powers of supervision—the Company took over from a provisional association the territories acquired by cession from the Sultans of Brunei and Sulu. Under an Agreement entered into with His Majesty's Government in 1888, the State was placed under British protection.

The area of North Borneo is about 29,500 square miles. With a coast line of 900 miles, the Territory possesses a number of good harbours and roadsteads. Sandakan, the principal town, is 1,000 miles from Singapore and 1,200 miles from Hong Kong.

The climate, for a tropical country, is equable and healthy. Coast temperatures vary from an average minimum of 74° F. in the morning to an average maximum of 88° F. in the afternoon; the uplands of the interior are cool. The annual rainfall varies from 58 to 180 inches according to locality. In 1933, the lowest total for the year was 58½ inches at Tawau and the highest 152½ inches at Beaufort.

All land is held on lease from the British North Borneo Company. Leases are for 999 years in the case of country land and 99 years for town land, are subject to rent and cultivation clauses, and convey surface rights only, minerals and precious stones being reserved by the Chartered Company.

II.—Population, etc.

The population as returned at the 1931 Census was 270,223 distributed as follows:—

Europeans	...	...	...	...	...	...	340
Eurasians	...	...	...	...	...	...	236
Natives of Borneo	...	...	...	...	...	...	205,218
Chinese	...	...	...	...	...	...	47,799
Japanese	...	...	...	...	...	...	450
Natives of Netherlands East Indies	...	...	...	...	...	...	9,854
Philippine Islanders	...	...	...	...	...	...	2,849
Malays	...	...	...	...	...	...	1,640
Natives of India and Ceylon	...	...	...	...	...	...	1,298
Others	...	...	...	...	...	...	539
Total	...	...	...	...	...	...	270,223

This total compares with totals of 257,804 recorded at the 1921 Census and 208,183 at the 1911 Census.

The estimated population as at the 31st December, 1933, was 274,195.

At the Census of 1931 the following figures were returned under the heading "occupations":—

<i>Earners and Dependents.</i>							
Producers of raw materials (of whom the bulk were agricultural workers; of the relatively small remainder, fishermen and forestry workers formed the bulk)	...	...	...	...	...	...	231,631
Manufacturers and workers in materials (mainly sago workers, shipbuilders, and saw-mill workers, engineering and waterworks employees, tailors and textile workers, and fish curers)	...	...	...	...	...	...	11,114
Commerce and finance	...	...	...	...	...	...	10,002
Public service and professions	...	...	...	...	...	...	5,950
Transport and communications	...	...	...	...	...	...	4,094
Personal service	...	...	...	...	...	...	3,081
Miscellaneous...	...	...	...	...	...	...	4,351
Total	...	...	...	...	...	...	270,223

The immigration of Chinese, who rapidly become acclimatized, has been sedulously fostered by the Chartered Company as being of prime importance to the industrial development of the State. The economic depression of recent years stemmed for a time the influx of Chinese, but the figures for 1933 and the first half of 1934 indicate a turn in the tide. From time to time large numbers of Javanese have entered the State for employment mainly on rubber estates; in the majority of cases, however, they have not settled in the country but have returned to their homes in Java.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the Singapore dollar which has a fixed value of 2s. 4d. and is divided into 100 cents. There is an issue of Treasury notes in the denominations of \$25, \$10, \$5, \$1, 50 cents, and 25 cents, a silver coin of 25 cents and also a nickel subsidiary coinage of 5 cents, 2½ cents, and 1 cent. Singapore silver is accepted as current.

2. Banking facilities are provided by the State Bank, which has its offices at Sandakan, with an agency at Jesselton.

The whole of the capital required for running the State Bank has been furnished by the Chartered Company, which has also from time to time granted liberal financial assistance to commercial undertakings operating in the State.

B.—PUBLIC FINANCE.

1.—Public Debt.

The State finances are under the exclusive control of the Chartered Company, whose Balance Sheet showed, at 31st December, 1933:—

£						
5 per cent. First Mortgage Debentures	...	...	...	...	...	1,451,500
5 per cent. Certificates of Indebtedness	...	...	...	...	...	88,401
Treasury notes in circulation	...	...	...	...	...	119,030
						£1,658,931

The First Mortgage Debentures are secured by Trust Deed (to Martins Bank, Limited) as a first specific charge on the railways, telegraphs, and certain other assets and as a first floating charge on the remaining property and assets. The Debentures are redeemable on or before 1st January, 1974.

The Certificates of Indebtedness were issued to certain of the shareholders in rubber companies in exchange for their shares and are redeemable at par on or before 31st December, 1950.

The Debentures and Certificates of Indebtedness are not "trustee securities."

The Debenture Trust Deed provides for a Sinking Fund amounting to $\frac{1}{2}$ per cent. per annum and operating by purchase at or under par or by drawings in May (for repayment on 1st July) at par.

In respect of the Certificates of Indebtedness there is a Sinking Fund which stood at £12,451 on 31st December, 1933. In addition the Company from time to time purchase and cancel Certificates offered for sale; in 1933, £2,360 was redeemed in this manner. The whole of the balance outstanding of these Certificates is being redeemed in 1934.

2.—Revenue.

(a) Analysis of Revenue (on basis of Estimates, 1934).

Self-balancing Departments.

	Revenue.	Expenditure.	Surplus (+) or Deficit (—).
	\$	\$	\$
Railways	131,500	131,772	— 272
Posts, telegraphs and tele- phones	81,325	86,354	— 5,029
Government Hotels ...	5,200	11,500	— 6,300
Net deficit \$11,601.			

General Revenue.

	\$	Percentage.
Customs	846,975	40.1
Excise	272,450	12.9
Land Revenue	223,480	10.6
Forest Revenue	178,120	8.4
Local Rates	158,770	7.5
Miscellaneous and other revenue...	431,300	20.5
Equivalent to £246,292	2,111,075	100
Revenue of self-balancing Departments set-off against Expenditure	218,025	
Total	\$2,329,100	

(b) Analysis of Import Duties.

The North Borneo trade returns do not specify (except in one or two instances) the yield from Customs Duties on particular commodities, nor do they indicate the yield according to country of origin or destination.

3.—Expenditure.

Analysis of Expenditure (on the basis of actual results of 1932).

	\$	Percentage.
I. Deficit on self-balancing Departments ...	11,601	0.7
II. Administration	1,225,006	68.1
III. Economic Development	208,730	11.6
IV. Social Services	295,988	16.4
V. Pensions and Gratuities (including contribu- tions by the company to Staff Pension and Provident Funds)	58,576	3.2
Equivalent to £209,988	1,799,901	100
Expenditure of self-balancing Departments set-off against Revenue	218,025	
Total	\$2,017,926	

4. Reserve Funds, etc.

At the end of 1933 the amount of the "Reserve" shown by the Chartered Company's Balance Sheet was £87,097. Investments in local enterprises totalled £327,921 "at cost".

5. Grants-in-Aid, etc.

A grant of £10,000 per annum has been received from the Colonial Development Fund for road construction in North Borneo in each of the four years 1930-33 inclusive. In respect of 1934 a further sum of £10,000 from the same source has been promised, making a total of £50,000 for the five years. An application has been submitted for a continuance of the grant of £10,000 per annum for road construction during the five years 1935-1939 inclusive.

IV.—Trade Statistics.

The trade returns do not give details regarding the places of origin of imports or the destination of exports. The greater part of the trade is conducted through Singapore and Hong Kong.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) for the years:—*

			Equivalent to				Equivalent to
		\$	£			\$	£
1913	...	7,398,128	863,115	1932	...	5,809,295	677,751
1930	...	8,995,475	1,049,472	1933	...	6,021,652	702,526
1931	...	7,009,003	817,717				

(ii) *Total Exports of Merchandise by Classes, 1933.*

						Equivalent to
					\$	£
Class I...	...	...	...	...	1,013,914	118,290
Class II	...	...	...	...	4,593,597	535,920
Class III	...	...	...	...	209,161	24,402
Class IV	...	...	...	...	204,644	23,875
					<u>6,021,316</u>	<u>702,487</u>

In addition there were exports of bullion and specie to the value of \$336 equivalent to £39.

(iii) *Principal Domestic Exports, 1933.*

Article.	Quantity.	Value.
<i>Class I.</i>		\$
Tobacco—		
Estate	694,061 lb.	617,528
Chinese and Foreign	20 „	48
Native	30,021 „	13,221
	<u>724,102 „</u>	<u>630,797</u>
Dried fish and salt fish	27,730 cwt.	207,753
Birds' nests	463 „	60,328
Shell Fish	3,941 „	45,869
<i>Class II.</i>		
Timber	4,571,815 c. ft.	2,271,103
Rubber, Plantation	155,669 cwt.	1,534,278
Copra	9,564 tons	347,623
Damar	65,486 cwt.	102,183
Hides	1,948 „	67,367
Firewood	13,347 tons	56,070
Coal	4,531 „	45,310
<i>Class III.</i>		
Cutch	1,504 tons	180,467
<i>Class IV.</i>		
Live-stock... ..	37,724 head	67,812

IMPORTS.

(i) *Total Imports (including Bullion and Specie) for the years:—*

			Equivalent to				Equivalent to
		\$	£			\$	£
1913	...	5,438,897	634,538	1932	...	3,347,491	390,541
1930	...	6,383,388	744,729	1933	...	3,377,943	394,093
1931	...	3,839,960	447,995				

(ii) *Total Imports by Classes, 1933.*

						Equivalent to
					\$	£
Class I	...	...	...	...	1,614,702	188,382
Class II...	...	...	...	...	54,921	6,408
Class III	...	...	...	...	1,474,362	172,009
Class IV	...	...	...	...	233,558	27,248

In addition there were imports of bullion and specie to the value of \$400 equivalent to £46.

(iii) *Principal Imports, 1933.*

Article.	Quantity.	Value.
<i>Class I.</i>		\$
Rice, Flour, Grain, and Padi	12,996 tons	744,013
Provisions, Fruit, Vegetables, etc.	1,951 „	358,049
Tobacco	183,809 lb.	196,528
Sugar	1,730 tons	132,823
Spirits and Wines	35,432 gal.	93,679
Coffee	1,954 cwt.	38,127
<i>Class II.</i>		
Bean oil	3,790 cwt.	37,526

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Quantity.</i>	<i>Value.</i> \$
<i>Class III.</i>		
Cloth, cotton, thread, yarns, etc.	—	507,299
Oil—		
Kerosene	31,274 cases	135,056
Petrol, Benzine, etc.	122,171 gal.	103,542
Lubricating	—	29,501
		268,099
Iron-ware and Metal-ware ...	538 tons	165,809
Medicines	—	87,485
Stationery and Paper Goods ...	—	57,326
Machinery... ..	82 tons	42,949
Building Materials and Timber...	—	42,134
Chemicals and Dyes	—	39,504
Earthenware and Glassware ...	—	37,231

V.—Natural Resources.

A.

1. AGRICULTURE.

The chief agricultural products of the State are rubber, tobacco, coconuts, rice, and sago.

Rubber.—The area under rubber at the end of 1933 was about 145,000 acres of which the larger estates comprise roughly 103,000 acres, the balance of 42,000 acres representing small-holdings. Chinese and Javanese labourers are mainly employed, but there is a fair proportion of native labourers.

The serious effect on exports of the slump in the market price of rubber is shown by the following figures:—

<i>Year.</i>	<i>Total Value of Exports. £</i>	<i>Exports of rubber. Quantity. Tons.</i>	<i>Value. £</i>
1926	1,938,608	6,079	1,259,624
1932	677,751	5,379	81,991
1933	702,526	7,783	178,999

Tobacco.—Wrapper leaf tobacco for cigars has been grown in North Borneo since 1883, and exports of this product at one time reached a value of £340,000. It is believed that North Borneo is the only part of the Empire in which this particular kind of tobacco is produced in appreciable quantities. Unfortunately adverse market conditions have in recent years seriously affected exports which in 1933 were valued at £72,045, as compared with £74,523 in 1932. Except for small-scale planting in the Interior Residency, tobacco cultivation has for the time being ceased. In Darvel Bay, which was formerly the main producing area, planting is likely to be resumed in the near future.

Coconuts.—53,706 acres of coconuts were under cultivation at the end of 1933, almost wholly in plantations. Exports of copra in 1933 were 9,564 tons valued at £40,556 as compared with 7,329 tons in 1932 valued at £44,591.

Rice.—In 1933, there were 76,500 acres (as compared with 79,200 acres in 1932) under rice culture which forms the principal occupation of the natives, for whom rice is the staple food. The yield in 1933 was 13,659,988 gantangs of unmilled rice, equivalent to 24,639 tons of milled rice, as compared with 15,305,916 gantangs and 27,608 tons respectively in 1932.

Sago.—In former years sago occupied a high place in the list of exports, but low market prices have latterly seriously depressed the industry. In 1933 the quantity shipped was 1,671 tons valued at £2,790, as compared with 1,371 tons and £4,894 in 1932. The area under cultivation was 13,926 acres.

The suitability of the Territory for the cultivation of other tropical products such as the African oil palm, manila and sisal hemp, kapok, coffee, pepper, and gambier, has been amply demonstrated by small-scale and experimental cultivation.

2. FORESTRY.

Timber.—One of the State's most valuable assets is its extensive forests which contain timbers suitable for practically all purposes. The timber industry has shown steady development, and in 1933 the quantity of timber exported was 4,571,815 cubic feet, valued at £264,962, as compared with 4,241,041 cubic feet valued at £283,897 in 1932. The principal markets were Hong Kong (44 per cent.), Japan (32 per cent.), China (14 per cent.), and the United Kingdom (6 per cent.).

The two leading timber concerns operating in the State are the British Borneo Timber Company and the North Borneo Trading Company. Two or three Chinese firms are also engaged in the logging business.

Cutch, a tanning and dyeing substance prepared from the bark of certain mangrove trees, is manufactured at Sandakan by the Bakau and Kenya Extract Company, Limited. Exports of this commodity amounted in 1933 to 1,504 tons valued at £21,054, as compared with 1,446 tons valued at £20,411 in 1932. Bark, for manufacture into cutch in Brunei and the Philippine Islands, is also exported.

Minor forest products exported include rattans, damar resin, camphor, and Illipe nuts (a source of edible fat).

The nipah palm, which exists in abundance, offers a field of enterprise for the extraction, from the sap, of power alcohol and sugar, the possibility of which has been proved by experiments undertaken by the Chartered Company.

3. ANIMAL HUSBANDRY.

There is a small export trade in live-stock (cattle, pigs, and poultry), exports amounting to £7,911 in 1933, as compared with £3,636 in 1932. The estimated figures of live-stock at the end of 1933 were: buffaloes 45,602, pigs 27,090, cattle 23,280, goats 8,488, and ponies 1,909. Small quantities of locally-manufactured leather find their way to the Hong Kong market.

4. MINERALS.

Coal exists at various places in the Territory and was worked commercially at Cowie Harbour in the south-east for a number of years prior to 1931, when operations were discontinued.

Petroleum.—An oil concession covering the whole Territory has recently been granted to the Anglo-Saxon Petroleum Company, Ltd., and prospecting operations under that concession have already been begun.

Gold is found on the East Coast in the form of fine alluvial deposits. Other minerals known to exist are *iron-ore*, *copper pyrites*, *chromite*, *manganese-ores*, *zinc blende*, and *arsenical pyrites*.

5. FISHERIES.

Fishing gives employment to large numbers of natives and Chinese; the former for the most part selling in the local markets, the latter salting and curing their catch for export. The chief market for dried fish is Hong Kong.

A Japanese fishing company operates in the south-east, exporting dried tunny and bonito to the Japanese market.

In 1932 and 1933 the quantities of dried and salt fish shipped were 1,823 tons valued at £38,283, and 1,386 tons valued at £24,238, respectively.

Seed pearls occur in various localities; they are mostly used, after being ground to a powder, as medicine by the Chinese.

Turtles are fairly common and there is a good trade in both the shell and the eggs.

Other items of marine produce are *trepang* (*bêche-de-mer*) and *blachan*—a kind of paste made of dry shrimps.

6. MISCELLANEOUS.

Edible birds' nests, collected from limestone caves, are an important item of export. The value varies considerably from year to year: in 1928 the figure was £14,601, in 1932 only £5,896, and in 1933 it increased to £7,038.

B.

FOOD SUPPLY.

As already indicated, the staple food of the population of North Borneo is rice. The supply of locally-grown rice is not nearly sufficient to meet the demand and the deficiency has to be made good by imported rice; even in 1932, a year of abundant harvests, as much as 8,648 tons were imported. In 1933 imports increased to 10,680 tons. Efforts to stimulate local production have met with some success, but these measures have been hampered by the low price of foreign rice, with which local producers have in some instances been unable to compete.

VI.—Industry.

There are no large industries apart from those referred to above.

VII.—Other Economic Activities.

Entrepôt trade and tourist traffic exist only to a very limited extent in North Borneo.

VIII.—Communications.

The State Railway, 125 miles long, links the port of Jesselton, on the West Coast, with Melalap in the interior and Weston on Brunei Bay, and serves a large number of European rubber estates and Chinese and native holdings. The Railway is owned by the Chartered Company.

The road system is being gradually extended under a ten-year scheme of road construction, towards the cost of which a grant of £10,000 in each of the years 1930-34 inclusive has been made from the Colonial Development Fund. At the end of 1933 the total mileage of State roads outside municipal limits (first, second, and third class roads) was 206 miles. In addition there is an extensive bridle-path system covering approximately 600 miles.

There are seven post offices in the State at which all postal facilities are available to the public. Limited facilities are also available at all out-station district offices and on the mail trains of the State Railway.

A steamship service between local ports and (fortnightly) with the Southern Philippine Islands is maintained by the Sabah Steamship Company.

A weekly service of steamers, provided by the Straits Steamship Company, connects North Borneo ports with Singapore, Labuan, and Sarawak. Two vessels of the Indo-China Steam Navigation Company run regularly between Hong Kong and Sandakan; and calls are made at Tawau by two of the Osaka Shosen Kaisha's boats plying monthly between Java and Japan. Tawau also has a fortnightly service with Dutch East Indies ports maintained by the Koninklijke Paketvaart Maatschappij.

The tonnage of vessels entered at all ports in the State during 1933 was:—

(1) Merchant Shipping	326,594 tons, of which 50 per cent. were British and 36 per cent. Japanese.
(2) Men-of-War and Government Vessels... ..	23,127 „ of which 86 per cent. were British, the remainder belonging to the United States of America.
	349,721 „

There are at present no air services between North Borneo and other countries.

IX.—Tariff.

Customs Duties, either specific or *ad valorem*, are levied on most imports and exports.

The Customs (Import) Tariff was amended in 1933. The British preferential rates previously in force were made applicable to goods imported from all parts of the Empire; the range of commodities affected was extended; and in some instances the margin of preference was substantially increased.

X.—Trade Representatives.

The agents of the Chartered Company overseas are as follows:—

<i>Straits Settlements</i>			
(Singapore and Penang)	...	...	Messrs. Guthrie & Co.
<i>Philippine Islands</i>			
(Manila, Cebu, Iloilo)	...	...	Messrs. Smith, Bell & Co.
<i>Australia</i>			
(Adelaide, Sidney, Melbourne)	...	...	Messrs. Gibbs Bright & Co.
<i>China</i>			
(Hong Kong and Foochow)	...	...	Messrs. Gibb, Livingston & Co.
(Tientsin)	...	...	Messrs. Wm. Forbes & Co.
(Amoy)	...	...	Messrs. Tait & Co.
<i>India</i>			
(Bombay)	...	...	The Anglo-Siam Corporation, Ltd.
(Calcutta)	...	...	Messrs. Gillanders, Arbuthnot & Co.
(Madras)	...	...	Messrs. Best & Co., Ltd.
<i>Ceylon</i>			
(Colombo)	...	...	Messrs. J. M. Robertson & Co.

SARAWAK.

I.—Situation, etc.

Sarawak is an independent State founded by James Brooke, who became Rajah in 1841, and consists of the greater part of the north-west coast of Borneo, which has been ceded at various times to the first Rajah and his successors by the Sultan of Brunei. It has been under British protection since 1888 but His Majesty's Government have no rights of interference in the internal administration of the State.

In form Sarawak is a belt of land between the China Sea and Dutch Borneo, some 450 miles long and from 40 to 120 miles wide. To the north-east it is bounded by the State of North Borneo and the modern State of Brunei forms an enclave on the coast. Except in the extreme north and south the coastland forms a broad belt of undulating plain broken by occasional hills of lime, sandstone, or (more rarely) granite. The land rises in the interior in a succession of hills culminating in peaks between 6,000 and 8,000 feet high.

Numerous rivers intersect the country and afford the easiest and cheapest means of transport. The Rejang is navigable for 160 miles and the Baran for 100 miles. Most of the country is still covered with jungle and much of it is practically unexplored.

The climate is damp but not unhealthy for Europeans. Daily shade temperature averages about 80° and there is no marked change throughout the year. There is usually a drop of a few degrees during the night. Heavy rains are of frequent occurrence during the north-west monsoon (October to April).

II.—Population.

No exact census has been taken but the estimated population is 475,000. The people are mainly Malays and Dayaks, with a few Europeans and a number of Chinese, who come to work on rubber estates and in the oil-fields and for trading purposes. The registered births and deaths indicate an annual natural increase in the population. There are no large urban areas, Kuching, the capital and largest town having a population of about 25,000.

There is no emigration of importance, and no immigration other than that of Chinese, already mentioned. No figures of the total immigrants are available but in recent years owing to trade depression the inflow has ceased and there was an emigration of Chinese during the past three years of 6,974.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of currency is the Straits Settlements dollar (value 2s. 4d.) and Straits silver dollars and currency notes are in circulation. The Sarawak Government also issues currency notes in denominations of \$100, \$50, \$25, \$10, \$5, and \$1, and subsidiary coins of 50 cents and 20 cents (silver), 10 cents and 5 cents (nickel), and 1 cent (copper). The value of the Sarawak notes in circulation on the 1st September, 1933, was \$2,061,387 and of the subsidiary coinage issued \$164,550.

2. *Banks*.—There is a branch of the Chartered Bank of India in Kuching. The several Chinese "Banks" are run by local Chinese for their own convenience and do not confine themselves to banking operations in the European sense of the term.

B.—PUBLIC FINANCE.

1. *Public Debt*.—The State has no public debt.

2. *Revenue*.—The total revenue for the year 1933 was \$3,558,580.

Particulars of the various heads of revenue and of the receipts from Customs Duties on various classes of goods are not available.

3. *Expenditure*.—The ordinary expenditure in 1933 was \$3,301,235, and extraordinary expenditure \$247,839, giving a total expenditure of \$3,549,074.

4. *Reserve Funds, etc.*—At the 31st December, 1933, there was an excess of assets over liabilities of \$4,303,959. \$3,174,413 were held in liquid securities and \$299,889 in cash.

5. *Grants-in-Aid*.—The State has received no grants-in-aid of any kind from His Majesty's Government in the United Kingdom.

IV.—Trade Statistics.

The trade statistics do not give details regarding the place of origin of imports or the destination of exports.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) for the years:—*

					\$	£
1913	...	...	...	...	8,865,153	equivalent to 1,034,268
1930	...	...	...	...	25,489,514	" 2,973,777
1931	...	...	...	...	17,701,982	" 2,065,231
1932	...	...	...	...	13,676,463	" 1,595,587
1933	...	...	...	...	14,379,076	" 1,677,559

(ii) *Total Exports by Classes, 1933.*

					\$	£
Class I	...	...	...	...	2,093,549	equivalent to 244,247
Class II	...	...	...	...	4,403,752	" 513,771
Class III	...	...	...	...	6,666,981	" 777,815
Class IV	...	...	...	...	305,976	" 35,697
Class V	...	...	...	...	865,640	" 100,991
					14,335,898	" 1,672,521

In addition there were exports of specie and currency notes to the value of \$43,178 equivalent to £5,038.

(iii) *Principal Exports, 1933.*

(Exclusive of commodities which are not the products of the country.)

Article.						Total Quantity.	Total Value.
<i>Class I.</i>							\$
Pepper—							
White	...	...	...	...	...	49,649 cwt.	934,267
Black	...	...	...	...	...	15,584 "	171,911
						65,233 "	1,006,178
Sago flour	...	...	...	...	...	21,705 tons	816,528
Fish, dried and salted	...	...	...	...	...	9,484 cwt.	80,698
<i>Class II.</i>							
Rubber, plantation	...	...	...	...	...	222,940 cwt.	2,210,375
Crude Oil	...	...	...	...	...	128,684 tons	898,316
Jelutong, refined	...	...	...	...	...	44,603 cwt.	726,190
Jelutong, raw	...	...	...	...	...	28,058 "	152,972
Timber	...	...	...	...	...	—	113,339
Copra	...	...	...	...	...	2,399 tons	90,485
<i>Class III.</i>							
Benzine	...	...	...	...	...	78,990 tons	1,749,761
Liquid Fuel...	...	...	...	...	...	245,451 "	1,693,558
Kerosene in bulk	...	...	...	...	...	34,405 "	646,348
Solar Oil	...	...	...	...	...	81,134 "	563,937
Cutch	...	...	...	...	...	55,280 cwt.	395,754
Gold Ware	...	...	...	...	...	—	191,283
<i>Class V.</i>							
Gold, raw	...	...	...	...	...	17,398 oz. troy.	865,640

IMPORTS.

(i) *Total Imports (including Bullion and Specie) for the years:—*

					\$	equivalent to	£
1913	...	...	...	...	8,299,458		968,270
1930	...	...	...	...	16,456,024	"	1,919,869
1931	...	...	...	...	10,390,589	"	1,212,235
1932	...	...	...	...	9,728,442	"	1,134,985
1933	...	...	...	...	11,357,105	"	1,324,996

(ii) *Total Imports by Classes, 1933.*

					\$	equivalent to	£
Class I	...	...	...	...	4,380,208		511,024
Class II	...	...	...	...	1,847,496	"	215,541
Class III	...	...	...	...	4,724,004	"	551,134
Class IV	...	...	...	...	396,914	"	46,307
<i>Total Merchandise</i>					11,348,622	"	1,324,006

In addition there were imports of specie and currency notes to the value of \$8,483 equivalent to £990.

(iii) *Principal Imports, 1933 (Exclusive of oil from Brunei).*

Article.	Total Quantity.	Total Value.
<i>Class I.</i>		
Tobacco—		
In tins, cigars and cigarettes		\$ 978,782
Chinese	14,400 lb.	13,741
Palembang, Java, and Sarobok, etc.	165,200 "	170,325
		1,162,848
Rice	16,662 tons	934,147
Sugar	3,007 "	361,682
Milk, condensed and sterilised	857,054 lb.	249,826
Wines and Spirits		185,827
Provisions, sundry... ..		168,901
Fish—		
Dried and Salted	477 tons	109,432
In tins		26,157
		135,589
<i>Class II.</i>		
Vegetable Oil	11,420 cwt.	108,488
<i>Class III.</i>		
Iron and Steel Manufactures		845,629
Cloth—		
Cotton		611,105
Silk and Woollen		98,334
		709,439
Cinematographic films		390,327
Machinery		353,259
Kerosene	69,140 cases	311,893
Clothing—		
Cotton		115,680
Silk and Woollen		4,930
Sarongs		92,798
		213,408
Opium		168,450
Drugs and Chemicals for manufacturing purposes		139,964
Drugs and Medicines		136,146
Matches	1,272,716 packets	115,750

V.—Natural Resources.

A.

1. AGRICULTURE.

With the exception of a few European estates growing rubber or oil-palms, agriculture is carried on entirely by small-holders and small plots of cultivation are scattered amongst the jungle. The uneconomic and destructive practice of shifting cultivation is common, although some efforts are being made to stop it.

Rubber.—In 1933 the estimated acreage under rubber was 264,912 of which only 101,709 acres were mature. The area owned by Europeans is about 10,000 acres, the remainder belonging to Chinese and natives, mainly small-holders. The principal areas of production are in the First, Second, and Third Districts, i.e., in the south-western part of the State.

Exports of plantation rubber in the past few years have been :—

				Value.					Value.		
				Tons.	£					Tons.	£
1929	...	...	11,170	1,001,000	1932	...	...	7,060	111,283		
1930	...	...	10,600	473,832	1933	...	...	11,147	257,877		
1931	...	...	10,400	222,585							

Pepper is the next most important export crop, exports having increased considerably of late years. The estimated acreage under mature pepper in 1933 was approximately 4,000 acres (compared with 3,551 acres in 1932 and 2,013 acres in 1931). The Government have instituted a Pepper Improvement Scheme and are endeavouring to raise the standard of quality of exports by reducing the export duty in favour of pepper that passes an approved standard.

Exports have been as follows :—

				Value.					Value.		
<i>White pepper</i> —				cwt.	£	<i>Black pepper</i> —				cwt.	£
1929	...	...	20,805	196,987		1929	...	...	2,412	13,550	
1930	...	...	26,317	101,667		1930	...	...	5,529	12,488	
1931	...	...	42,617	126,585		1931	...	...	6,269	9,093	
1932	...	...	34,598	84,511		1932	...	...	49,951	81,409	
1933	...	...	49,649	108,998		1933	...	...	15,584	20,056	

Sago is the third export crop in value. The area under mature sago is estimated at 80,000 acres and there are further immature areas of unknown extent. Exports are in the form of sago flour and have been as follows :—

				Value.					Value.		
				Tons.	£					Tons.	£
1929	...	...	12,128	99,212	1932	...	...	21,705	95,262		
1930	...	...	15,579	112,116	1933	...	...	24,299	88,048		
1931	...	...	13,791	52,314							

Coconuts are grown in many scattered areas. The total acreage is estimated at 21,000 acres, of which some 10,000 acres are in bearing. Much the greater part of these plantations are in Chinese ownership. Exports (details below) are wholly in the form of copra, of which the quality, whether smoked or sun-dried, is at present generally poor. There is a manufacture for local uses of oil, oil-cake, and soap, but details are not available.

Exports of copra have been :—

			<i>Value.</i>					<i>Value.</i>	
			Tons.	£				Tons.	£
1929	...	...	2,070	27,355	1932	...	...	2,933	20,732
1930	...	...	2,547	28,147	1933	...	...	2,399	10,557
1931	...	...	2,609	16,636					

Other export crops.—A number of minor crops have been taken up by cultivators lately with the assistance of the Agricultural Department, which, although it does not advise on the crops to be grown, does give advice on methods of production and tests possible new crops. **Coffee**, both *Robusta* and *Liberian*, is rapidly gaining popularity and there has been large distribution of seedlings and selected seed. No export at present exists as production is still less than the internal demand. *Areanuts* are exported in small quantities (198 tons in 1931, 99 tons in 1932, and 19 tons in 1933). *Oil-palms* have been planted but there is little activity. *Nipah* palm sugar is exported (205 tons in 1931, 155 tons in 1932, and 149 tons in 1933). *Tuba* is cultivated on about 1,000 acres; most of the production is used locally, including some used on pepper gardens for spraying, but exports amounted to 108 tons in 1931, 37 tons in 1932, and 73 tons in 1933. Other products in which there has been or may be an export include pineapples, tapioca, tea, and sisal and Manila hemp. Mauritius hemp has been tried but appears wholly unsuitable. Gambier was formerly exported but planting has now practically ceased.

Rice is one of the principal crops, although there are no exports as production is insufficient to meet the local demand and imports in the last five years have averaged just under 20,000 tons per annum. During this period imports have fallen from 24,921 tons in 1929 to 16,662 tons in 1933. This was probably partly the result of decreased employment on rubber estates and oil-fields and consequent emigration of Chinese labourers. No estimates of the total area under cultivation or of production are available.

Other food-crops cultivated include soya-beans, millet, yams, maize, groundnuts, and sugar-cane.

Tobacco cultivation was started experimentally about 1930 and has developed rapidly, being grown as a catch-crop with a readily realizable cash value. A considerable manufacture of tobacco and cigarettes for local consumption is developing.

2.—FORESTRY.

Although there has been much destruction of forest by the practice of shifting cultivation considerable areas of virgin forest remain. Certain forest reserves have been established, covering (at 31st December, 1933) 535·88 square miles or 1·16 per cent. of the area of the State. The principal forest products are :—

1. **Timber.**—No details of production are available in respect of 1933. Export of timber is, since 1932, controlled by the Forest Department to ensure that timber exported is free from insects and fungus and otherwise suitable for export. The value of exports in 1933 was £13,223.

2. **Jelutong** a variety of gum or rubber. Exports in 1933 were 2,230 tons (value £84,722) of refined and 1,406 tons (value £17,847) of raw jelutong.

3. **Other gums and resins** including the resins damar daging, damar darat, and the gums jangkar, gutta percha, etc. The total value of gums, etc., other than rubber and jelutong exported in 1933 was £11,383.

4. **Cutch** or catechu, an extract of mangrove bark, used for tanning purposes. Exports formerly amounted to over 2,500 tons per annum, almost ceased in 1931 but recovered to 1,345 tons (value £24,735) in 1932 and 2,764 tons (value £46,171) in 1933.

5. **Firewood and charcoal** are produced for local use.

6. **Canes and rattans** are exported in small quantities (total value in 1933 £4,094).

3.—ANIMAL HUSBANDRY.

Numbers of cattle, goats, etc., are kept but there is no important organized live-stock industry. Butter and ghee are produced locally. The Government maintains two dairy farms and has endeavoured to improve the general standard of maintenance and the quality of stock by importing animals for breeding. A small number of poultry and swine are exported every year, but generally speaking more are imported than exported. A few buffalo and cow hides and skins are exported.

4.—MINERAL.

No detailed geological survey has been made and the only minerals of which there have been workings in important quantities are oil, coal, and gold.

Oil.—Oil is the most important export of the State and the production is under the control of Sarawak Oilfields Limited, subject to the payment of a royalty to the State. Production during the past five years has been as follows:—

			<i>Tons.</i>
1929	...	...	738,405
1930	...	...	688,424
1931	...	...	520,395
1932	...	...	335,287
1933	...	...	321,299

Some kerosene oil and benzine are imported from neighbouring states and crude oil is imported from Brunei in large quantities (276,892 tons valued at £200,746 in 1933). Export figures for the past five years are as follows:—

	<i>Benzine.</i>		<i>Kerosene in bulk.</i>		<i>Liquid Fuel.</i>		<i>Crude Oil.</i>		<i>Solar Oil.</i>	
	<i>Tons.</i>	<i>Value. £</i>	<i>Tons.</i>	<i>Value. £</i>	<i>Tons.</i>	<i>Value. £</i>	<i>Tons.</i>	<i>Value. £</i>	<i>Tons.</i>	<i>Value. £</i>
1929...	...	230,717 1,292,014	63,795	163,741	276,102	322,118	152,806	178,273	11,034	20,598
1930...	...	183,933 1,030,023	64,209	164,804	235,118	274,305	124,364	145,092	37,775	70,513
1931...	...	128,401 572,241	38,141	87,226	202,939	206,388	94,849	92,991	46,549	74,485
1932...	...	94,474 278,675	50,378	120,773	196,422	173,185	127,763	112,416	50,967	50,968
1933...	...	78,990 204,139	34,404	75,407	245,451	197,582	128,684	104,804	81,134	65,793

Coal.—The Sadong Collieries, under Government control, formerly operated but several of the mines have been worked out and the undertaking was closed in 1932. The maximum output in recent years was in 1931 when 18,213 tons were exported. There is a large proved coal-field at Selantik, at present in the hands of concessionaires, but it is in an inaccessible situation and requires much capital for development.

Gold.—There has been a small production for many years and recently it has shown signs of expansion. Recorded production was 1,820 fine ounces in 1930, about 7,500 ounces in 1931, 8,179 ounces in 1932, and 18,712 ounces in 1933. There has been a revival of prospecting and new deposits have been found in the vicinity of Kuching, but their value is as yet unproved. The existing mines, at Bau, are expected to become exhausted soon.

Exports in the last five years have been as follows:—

		<i>Quantity in oz.</i>	<i>Value in £.</i>
1929	...	972	4,107
1930	...	4,026	14,866
1931	...	10,451	38,146
1932	...	8,359	47,709
1933	...	17,398	100,991

5. FISHING AND MARINE PRODUCTS.

There is a considerable local fishing industry, primarily for local consumption but there are exports (principally dried fish) valued at over £38,000 in 1929 but have been decreasing of late years as the following figures show (1931, £13,673; 1932, £12,007; 1933, £9,415). There are also small exports of blachan (a fish paste) and turtle-eggs.

6. MISCELLANEOUS.

There are exports of edible *birds nests* to China and Singapore, valued at £4,520 in 1933.

B.

V.—Food Supply.

It would probably be true to say that the mass of the native population is self-supporting in food. By far the most important food import is rice which is required, partly at least, by the immigrant labourers. The following table shows the quantity and value of imports of rice during the past five years:—

			Quantity in tons.	Value in £.
1929	...	...	24,921	355,469
1930	...	...	24,122	312,714
1931	...	...	18,283	155,397
1932	...	...	14,483	115,152
1933	...	...	16,662	108,984

Flour, meat, and other foodstuffs are also necessarily imported for the European residents.

VI.—Industry.

Apart from the semi-industrial establishments connected with the oil-fields and undertakings of a public utility nature (e.g., electricity supply) there are no industrial undertakings in Sarawak.

VII.—Other Economic Activities.

Nil.

VIII.—Communications.

(i) INTERNAL.

The Government owns a short length of railway (10 miles long) but this is no longer in active use. The mileage of roads at the end of 1933 was:—

				Miles.
Metalled first class	...	...	...	24
„ second class	...	...	...	77
Earth roads	...	...	...	305

The few metalled roads are in the vicinity of Kuching, the capital, and other towns. A road to connect Kuching with Simanggang and Sibü (a distance of over 100 miles) is projected and 40 miles have been constructed. During the year construction of new roads was entirely suspended with the exception of a small extension of the Lawas-Trusan Road, but improvements of various roads were undertaken. The Saratok-Roban Road was opened to traffic by the construction of bridges and some miles of bridle paths were constructed in the Lubok Antu and Saratok District.

(ii) EXTERNAL.

Communication between Kuching and Singapore is maintained by a weekly service of vessels of the Sarawak Steamship Company, Limited, and the Straits Steamship Company, Limited. The latter Company's vessels call at Miri, Labuan, and North Borneo as well. The Sarawak Steamship Company's vessels call also at Sibü which is also served by the Soon Bee Shipping Company. Communication between Kuching and the northern ports of the State is irregular.

Of the total tonnage of 777,082 entering Sarawak ports in 1933, 637,498 tons entered at Miri (principally oil-tankers), 99,188 at Kuching, and 24,860 at Sibü.

IX.—Tariff.

Duties are levied on a comparatively restricted list of goods, comprising:—

- (i) alcoholic liquors and tobacco, at various specific rates;
- (ii) salt, sugar, flour, tea, and a few other foodstuffs, at specific rates;
- (iii) fuel oils, matches, firearms and ammunition, soap, cement, and a few other articles at *ad valorem* or specific rates; and
- (iv) timber, cycles, motor cars, and machinery at *ad valorem* rates of 10 per cent. preferential and 30 per cent. general.

As indicated certain manufactured articles of Empire origin are admitted at preferential rates. Besides those mentioned there are preferential rates for cement and condensed milk.

X.—Trade Representatives, etc.

The Sarawak Government maintains a special Commissioner in London, whose address is Sarawak Government Offices, Millbank House, S.W.1.

MAURITIUS.

I.—Situation, etc.

The Colony of Mauritius consists of the Island of Mauritius itself and the Dependencies, viz., Rodrigues and the three groups of the "Oil Islands" (1) Diego Garcia and Peros Banhos, (2) Agaléga, and (3) the Six Islands. The whole group lies in the southern Indian Ocean, Mauritius itself in longitude 57° East, latitude 20° South. The remaining islands are scattered at distances of from 230 to 1,200 miles, Rodrigues being 350 miles to the north-east. The area of Mauritius is 720 square miles, and that of the Dependencies 89 square miles. Mauritius is chiefly of volcanic formation and there are several short ranges of mountains. The highest peak is 2,711 feet in height.

Mauritius, although just within the tropics, is free from extremes of heat and cold. The south-east trade-winds blow the greater part of the year but in December to March are replaced by the light variable winds of the doldrums. In the winter months the temperature may fall to 50° F. in the areas above 1,300 feet. Rainfall varies from an average of 30 inches near the coast to 150 inches in the highlands.

In 1933 at the Royal Alfred Observatory, seven miles from Port Louis, the capital of the Colony, about 179 feet above the sea level, the lowest recorded monthly minimum temperature was 52·9° F. in July and the highest 70·0° F. in March while the highest recorded monthly maximum was 93·0° F. in January and the lowest 77·0° F. in July. The total rainfall recorded there in 1933 was 34·76 inches.

The Colony is liable to be visited during the season from December to April by cyclonic storms which generally do little damage except to crops but occasionally are of great severity and cause extensive damage to property and loss of life.

Of the total area of Mauritius, some 460,800 acres, 381,156 acres are in private possession and the rest are Crown lands. A large proportion of the private land is in small-holdings, and the tendency for the land to be broken up in this way is likely to become more pronounced. Of the total number of individual holdings (about 14,720) about 14,000 are in lots of under 10 acres and only about 50 in lots of over 1,000 acres.

The area under cultivation in the Colony in 1933 was about 174,216 acres or just under 38 per cent. of the whole area. Of this area 138,116 acres, that is, 30 per cent. of the whole area of the Island or 79 per cent. of the area under cultivation, are under sugar.

No precise details regarding the occupation and cultivation of land in the Dependencies are available.

II.—Population, etc.

Until about 100 years ago the population was composed entirely of the descendants of European settlers and the African slaves imported by them, but since then there has been a steady immigration of Indians who were brought in in large numbers in the early days of British occupation: many of them have now become domiciled, and this Indian population now greatly outnumbers the inhabitants of European and negro origin. There is also a small community of Chinese immigrants.

At the census of April, 1931, the population of Mauritius (exclusive of the Dependencies) was:—

General population (including families of military) ...	...	115,751
Indian population ...	...	268,649
Chinese population ...	...	8,923
Total ...	...	393,323

It was estimated that by the end of the year 1933 these figures had altered to:—

General population ...	...	118,698
Indian population ...	...	263,571
Chinese population ...	...	8,428
Total ...	...	390,697

At the census of 1931 the population of the Dependencies was 9,438 general and 221 Indian, a total of 9,659, of whom 8,202 were in Rodrigues and 1,457 in the other islands.

By the end of 1933 the population of the Dependencies was estimated to have increased to 10,310, of whom 8,950 were in Rodrigues and 1,360 in the other islands.

The estimated total population of Mauritius and its Dependencies at the 31st December, 1933, was, therefore, 401,007.

It was estimated at the time of the census that in Mauritius the following numbers of persons were employed as follows:—

Agricultural ...	...	72,027
Industrial ...	...	20,287
Domestic service ...	...	14,913
Commercial ...	...	16,314
Professional ...	...	8,330
		131,871

Of the remainder, children attending school numbered 29,860, while persons without specific occupation, children not returned as attending school, old people, etc., totalled 231,592.

III.—Finance.

A.—BANKING AND CURRENCY.

The local unit of currency is the Mauritius rupee, equivalent to 1s. 6d. sterling, divided into 100 cents.

The coinage in circulation is as follows:—

Silver:—The Mauritius rupee, half rupee, quarter rupee, 20 cent and 10 cent pieces. The Indian rupee, half rupee, quarter rupee, and 4 anna piece. *Bronze*:—Mauritius 5 cent, 2 cent, and 1 cent pieces.

There is an issue of local currency notes, the amount outstanding at 30th June, 1934, being Rs.7,300,000.

Important legislation was enacted with effect from 1st May, 1934 (Ordinance 13 of 1934), by which the Currency Commissioners were placed under the obligation to issue notes in exchange for the payment of sterling in London at the rate of 1s. 6d. per rupee and to redeem them by paying sterling in London in exchange for notes.

Steps have been taken to substitute a new issue of Mauritius rupees for the Indian silver now in circulation, which will be gradually withdrawn and will eventually cease to be legal tender in the Colony.

Banks.—Three commercial banks operate in the Colony:—

<i>Title.</i>	<i>Paid up Capital.</i>	<i>Deposits in Mauritius on 30th June, 1934.</i>
		<i>Rs.</i>
Mauritius Commercial Bank	Rs.2,000,000	8,101,987
Mercantile Bank of India, Ltd.	£1,050,000	2,707,275
Barclays Bank (Dominion, Colonial and Overseas) ...	£4,975,000	2,588,318

Of these the first has its Head Office in Mauritius and its operations are confined to the Colony; the other two have their Head Offices in London and maintain branches in the Colony.

There is also a Government Savings Bank, the total number of depositors on the 30th June, 1934, being 38,322 with total deposits of Rs.5,401,710.

There are 28 co-operative credit societies in the Colony established under Ordinance No. 4 of 1913. The total number of members on 30th June, 1934, was 1,865 and the total share capital Rs.58,892. The rate of interest charged to members varies from 6 per cent. to 12 per cent. per annum.

B.—PUBLIC FINANCE.

1.—Public Debt.

(a) At the 30th June, 1934, the total public debt was Rs.43,293,258 equivalent at Re.1 = 1s. 6d. to £3,246,994 of which Rs.16,800,000 was local.

(b) In the Estimates for 1934-35 provision is made as follows:—

	<i>Rs.</i>
Interest	2,059,345
Sinking Fund	543,596

(c) At 30th June, 1934, the total value of the Sinking Funds amounted to Rs.22,662,260, equivalent to £1,699,669.

(d) A statement of particulars in regard to existing loans is annexed.

Of the loans in this list only the 3 per cent. of 1893 and the 5 per cent. of 1932 are trustee securities and both have been guaranteed as to interest and principal by His Majesty's Government in the United Kingdom.

STATEMENT OF PARTICULARS IN REGARD TO EXISTING LOANS.

<i>Year of Loan.</i>	<i>Amount.</i>	<i>Rate of Interest per cent.</i>	<i>Annual Interest Provision.</i>	<i>Annual Sinking Fund Provision.</i>	<i>Sinking Fund at 30-6-34.</i>	<i>Date of Repayment.</i>	<i>Remarks.</i>
	<i>£ s. d.</i>		<i>Rs.</i>	<i>Rs.</i>	<i>£ s. d.</i>		
1888 ...	482,390 16 0	4	257,275	64,320	645,422 10 10	1.8.1937	
1893 ...	600,000 0 0	3	240,000	80,000	687,248 18 5	1.1.1940	
1919-20	37,500 0 0(a)	6	15,000	Nil	38,944 1 0	15.10.1934	Held in Mauritius.
1921-23	37,500 0 0(a)	6	30,000	26,250	33,918 11 8	28.12.1936	do.
1923 ...	375,000 0 0(b)	6	300,000	83,952	100,093 4 8	19.1.1953	do.
1924 ...	75,000 0 0(c)	6	60,000	50,000	50,664 4 5	16.7.1939	do.
1925 ...	75,000 0 0(c)	6	60,000	50,000	44,163 6 1	1.10.1940	do.
1927 ...	330,000 0 0(d)	6	264,000	78,452	37,058 13 8	5.1.1935	do.
1927 ...	75,000 0 0(c)	6	60,000	50,000	34,948 16 2	2.12.1942	do.
1929 ...	204,603 11 7	5	136,403	—	—	1.5.1940	The Sinking Fund will be formed by the appropriation of the balances remaining in the Sinking Funds of the Mauritius 4 per cent. and 3 per cent. Stocks after redemption of the Stocks.
1929 ...	255,000 0 0(e)	5	170,000	60,662	27,207 4 2	10.9.1949-59	Held in Mauritius.
1929 ...	100,000 0 0	5	66,667	—	—	1.10.1942	The Sinking Fund will be formed by the appropriation of the balances remaining in the Sinking Funds of the Mauritius 4 per cent. and 3 per cent. Stocks after redemption of the Stocks.
1932 ...	600,000 0 0	5	400,000	—	—	1951-71	Formation of the Sinking Fund postponed for five years.

	<i>Rs.</i>
(a) Equivalent of 500,000 at 1s. 6d. the rupee.	
(b) " 5,000,000 " "	
(c) " 1,000,000 " "	
(d) " 4,400,000 " "	
(e) " 3,400,000 " "	

2.—(A) *Analysis of Revenue (on the basis of the 1934-35 Estimates).**Self-balancing Departments.*

	Revenue. Rs.	Expenditure. Rs.	Balance. Rs.
Railways	1,890,000	2,087,203	— 197,203
Post and Telegraphs including Wireless	329,426	283,989	+ 45,437
Harbour Traffic	472,000	418,302	+ 53,698
Government Dairy	15,000	15,200	— 200
	<u>Rs.2,706,426</u>	<u>Rs.2,804,694</u>	<u>— 98,268</u>
Net deficit	Rs.98,268		

General Revenue.

	Rs.	Percentage.
I. Surplus on self-balancing Departments	—	—
II. Customs :—	Rs.	
Import Duties	4,625,000	
Export Duties	820,000	
	<u>5,445,000</u>	37·50
III. Excise	2,985,200	20·50
IV. Licences, House Tax, and other internal revenue ...	3,310,150	22·75
V. Fees and reimbursements	1,182,385	7·75
VI. Interest and Rent	1,542,903	10·75
VII. Miscellaneous (including levy on salaries and appreciation of investments)	105,680	·75
* Equivalent at Re. 1=1s. 6d., to £1,070,349	14,571,318*	100
Revenue of self-balancing Departments set-off against Expenditure	<u>2,706,426</u>	
	<u>Rs.17,277,744</u>	

(B) *Analysis of Import Duties for 1933.**Amount of duty collected on Articles imported from :—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
Class I	500,834	753,779	565,271	1,819,884
Class II	11,133	51,123	8,565	70,821
Class III	506,238	116,228	2,034,769	2,657,235
Class IV	49	11	657	717
Total	<u>1,018,254</u>	<u>921,141</u>	<u>2,609,262</u>	<u>4,548,657</u>
Equivalent to	<u>£76,369</u>	<u>£69,085</u>	<u>£195,695</u>	
Passengers' Luggage, etc., and Parcel Post				140,369
				<u>4,689,026</u>
				<u>£351,677</u>

3.—*Analysis of Expenditure on the basis of the 1934-35 Estimates.*

	Rs.	Percentage.
1. Deficit on self-balancing Departments	98,268	0·70
2. Debt charges	2,602,941	18·50
3. Administration	3,460,221	24·50
4. Economic Development	978,496	7·00
5. Social Services	4,720,758	33·20
6. Defence	668,210	4·70
7. Non-effective, i.e., Pensions	1,629,500	11·40
* Equivalent at Re. 1=1s. 6d., to £1,061,879	14,158,394*	100·0
Expenditure of self-balancing Departments, set-off against Revenue	<u>2,706,426</u>	
	<u>Rs.16,864,820</u>	

4.—*Reserve Funds, etc.*

As at 30th June, 1934, there was a surplus of Assets over Liabilities of Rs.14,876,571. Only Rs.6,441,509 of this surplus was, however, held in cash and investments, of which Rs.4,900,000 was earmarked for the repayment of loans. Most of the remainder was advanced to the Government railway, the sugar industry, and other local enterprises.

5.—*Grants-in-aid.*

No grants-in-aid or loans-in-aid have been received from His Majesty's Government for many years.

The Colony has received the following grants from the Colonial Development and the Empire Marketing Funds:—

- (i) *Colonial Development Fund*.—£300 to pay the expenses of the visit of a tea expert.
 (ii) *Empire Marketing Fund*.—(a) A contribution, not exceeding £2,000 per annum, of one-half of the recurrent cost of the Sugar Research Station, for five years 1930-34.
 (b) A contribution, up to a maximum of £1,250, of one-half the cost of importing a supply of pineapple crowns from Hawaii (1931).

IV.—Trade Statistics.

The Mauritius Government publishes statistics both of imports from, and exports to, the rest of the world and of trade between Mauritius and its Dependencies. All the trade of the Dependencies passes through Mauritius. The true country of origin of imports is given where possible, but when this cannot be ascertained the country of consignment is given.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

				<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
				<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
1913	...	...	...	5,955,177	25,840,404	1,820,625	33,616,206
1930	...	...	...	19,023,108	6,458,682	1,123,674	26,605,464
1931	...	...	...	20,001,530	4,821,210	940,690	25,763,430
1932	...	...	...	26,857,246	1,145,352	702,605	28,705,203
equivalent to	...	...	...	£2,014,294	£85,901	£52,695	£2,152,890
1933	...	...	...	31,146,308	464,391	779,074	32,389,773
equivalent to	...	...	...	£2,335,973	£34,829	£58,431	£2,429,233

(ii) *Domestic Exports by Classes, 1933.*

<i>To</i>			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
			<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
United Kingdom	...	...	30,755,314	281,540	8,240	31,258	31,076,352
Hong Kong	...	...	113,949	—	—	—	113,949
Rest of Empire	...	...	9,263	12,694	5,407	8,985	36,349
<i>Total Empire</i>	...	...	30,878,526	294,234	13,647	40,243	31,226,650
France	...	...	70	9,429	—	106,154	115,653
Other foreign countries	...	...	700	40,109	4,240	41,042	86,091
<i>Total foreign countries</i>	...	...	770	49,538	4,240	147,196	201,744
GRAND TOTAL	...	...	30,879,296	343,772	17,887	187,439	31,428,394
Equivalent to	...	...	£2,315,947	£25,783	£1,341	£14,058	£2,357,129

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of destination with amounts in Rs.'000.</i>
		<i>Rs.</i>	
<i>Class I.</i>			
Sugar	223,025 tons	30,811,638	United Kingdom (30,702), Hong Kong (102).
<i>Class II.</i>			
Copra and Poonao	1,183 tons	201,393	United Kingdom (200).
Aloe Fibre	415 tons	87,802	United Kingdom (42), Belgium (21), United States of America (15).

(iv) *Exports from the Dependencies to Mauritius.*

The only commodity exported to Mauritius in commercial quantities for re-export is copra, of which 1,112 tons valued at Rs.174,861 (£13,114) were exported in 1933.

Among other articles exported to Mauritius for local consumption in 1933 were 86 oxen, 1,998 goats, 1,246 pigs, 581 sheep and 14,416 poultry valued in all at Rs.51,093 (£7,664), and 431 tons of salted and dried fish valued at Rs.181,742 (£13,631).

The total value of exports from the Dependencies to Mauritius in 1933 was:—

		<i>Rs.</i>	<i>equivalent to</i>	<i>£</i>
Class I	...	319,823		47,973
Class II	...	303,157		45,474
Class III	...	2,691		404
Class IV	...	1,252		188
Class V	...	941		141
Total	...	627,864		94,180

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

		United Kingdom. Rs.	Rest of Empire. Rs.	Foreign Countries. Rs.	Grand Total. Rs.
1913	...	12,218,219	15,672,342	9,112,648	37,003,209
1930	...	10,450,730	17,626,026	11,703,089	39,807,345*
1931	...	7,504,119	15,007,179	9,475,248	32,064,876*
1932	...	6,455,759	12,596,931	7,811,096	26,992,760*
equivalent to	...	£484,182	£944,770	£585,832	£2,024,457*
1933	...	9,421,478	11,049,089	8,487,775	29,035,237*
equivalent to	...	£706,611	£828,682	£636,583	£2,177,643

(ii) *Imports by Classes, 1933.*

From	Class I. Rs.	Class II. Rs.	Class III. Rs.	Classes IV. and V. Rs.	Total Merchandise. Rs.
United Kingdom ...	830,289	121,860	8,108,998	360,331	9,421,478
India ...	6,235,158	82,153	2,074,428	23,085	8,414,824
Australia and New Zealand ...	1,149,532	17,760	1,992	1,781	1,171,065
Union of South Africa ...	172,240	495,061	45,915	9,187	722,403
Malaya ...	24,158	221,221	15,330	837	261,546
Rest of Empire ...	236,419	44,950	193,897	3,985	479,251
<i>Total Empire</i> ...	8,647,796	983,005	10,440,560	399,206	20,470,567
Japan ...	47,661	187	1,736,362	8,495	1,792,705
France ...	194,341	31,787	828,500	375,869	1,430,497
United States of America...	110,391	57,501	881,779	10,800	1,060,471
Dutch East Indies...	191,872	62,015	650,171	825	904,883
Germany ...	15,777	83	482,080	72,985	570,925
Madagascar...	483,517	23,947	227	40,988	548,679
China ...	240,661	101	270,789	9,589	521,140
Belgium ...	25,041	—	402,160	1,487	428,688
Holland ...	167,562	1,248	105,406	1,400	275,615
Other foreign countries ...	220,270	74,273	575,245	84,384	954,172
<i>Total foreign countries</i> ...	1,697,093	251,142	5,932,718	606,822	8,487,775
Passengers' Baggage, etc....	—	—	—	76,895	76,895
GRAND TOTAL ...	10,344,889	1,234,147	16,373,278	1,082,923	29,035,237
Equivalent to ...	£775,867	£92,561	£1,227,996	£81,219	£2,177,643

(iii) *Principal Imports, 1933.*

Article.	Total Quantity.	Total Value. Rs.	Principal countries of origin with values in Rs.'000.
<i>Class I.</i>			
Grain and Flour, etc.			
Rice ...	49,910 tons	4,923,642	India (4,901), China (13), Siam (8).
Wheat flour ...	9,310 "	975,613	Australia (958).
Dholl ...	3,366 "	384,242	India (all).
Other kinds ...		266,133	India (217).
		6,549,630	
Edible Oils and Fats—			
Lard ...	3,197 cwt.	172,320	China (152).
Ghee ...	1,630 "	107,516	India (106).
Butter ...	1,188 "	97,816	Australia (91).
Margarine and other substitutes for butter ...	1,186 "	52,849	Holland (51).
Vegetable Oils—			
Soya Bean and other kinds ...	1,067 tons	439,350	United Kingdom (327), Holland (61), France (34).
Pistachio Nut ...	773 "	271,424	India (133), Dutch East Indies (132).
Mustard ...	490 "	177,873	India (all).
Other kinds ...	1 "	1,180	
		1,320,328	
Animals, living, for food—			
Cows and oxen ...	5,652	354,443	Madagascar (all).
Sheep ...	348	6,016	Australia (6).
Tortoises ...	75	78	Madagascar (all).
	6,075	360,537	

* Includes passengers' baggage not shewn in the previous columns, as follows:—

	Rs.		Rs.		Rs.
1930...	27,500	1932...	128,974	1933...	76,895
1931...	78,330	equivalent to	£9,673	equivalent to	£5,767

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. R's.</i>	<i>Principal countries of origin with values in R's '000.</i>
<i>Class I—continued.</i>			
<i>Fish—</i>			
Dried or salted and pickled ...	470 tons	233,593	Union of South Africa (93), India (80)
Tinned	249 „	113,668	Portugal (45), Japan (44)
	719 „	347,261	
<i>Class II—</i>			
Coal	38,404 tons	518,858	Union of South Africa (490)
Wood and Timber	7,586 c. yd.	266,860	Straits Settlements (208)
<i>Class III—</i>			
Chemical Manures	20,079 tons	2,328,299	United Kingdom (1,305), India (681), Chile (114)
<i>Cotton Manufactures—</i>			
<i>Piece-goods—</i>			
Printed, dyed or coloured ...	6,644,748 yd.	1,293,171	United Kingdom (694)
White	1,627,107 „	299,678	United Kingdom (189), Japan (106).
Grey	1,616,934 „	224,480	Japan (205).
Other kinds		344,272	United Kingdom (227).
		2,161,601	
<i>Oils—</i>			
Motor Spirit	1,264,227 gal.	844,760	Dutch East Indies (511), United States of America (290), Russia (43).
Illuminating	455,092 „	284,656	United States of America (178), Dutch East Indies (102).
Lubricating	133,981 „	154,485	United States of America (138).
	1,853,300 „	1,283,901	
<i>Jute Manufactures—</i>			
Gunny Bags	3,244,006	976,132	India (all).
Other kinds		8,062	United Kingdom (5).
		984,194	
<i>Motor Cars, etc., and parts—</i>			
Motor Cars	211	478,358	United Kingdom (335), Canada (127).
Motor-car parts, etc.		111,506	United Kingdom (77).
Motor lorries, tractors and parts		76,599	United Kingdom (46), Canada (18).
Tyres and Tubes		181,174	United Kingdom (137), Canada (29).
		847,637	
<i>Soap—</i>			
Common	1,719 tons	730,612	United Kingdom (701).
Toilet	37 „	50,565	United Kingdom (26), France (16).
	1,756	781,177	
<i>Machinery and Millwork and parts (all kinds).</i>			
		767,606	United Kingdom (645), France (43), United States of America (33), Germany (33).
Iron and Steel Manufactures ...		701,765	United Kingdom (470), Belgium (179).
Silk and Artificial Silk Manufactures		670,822	Japan (557), United Kingdom (62).
Woollen and Worsted Manufactures		389,676	United Kingdom (310).
Drugs and Medicines		347,971	United Kingdom (144), France (103).
Paper Manufactures		311,165	United Kingdom (174).
<i>Tramway Materials—</i>			
Rails, crossings, etc.		186,178	Luxembourg (74), Germany (53), Belgium (39).
Locomotives and parts... ..		80,380	Germany (54), United Kingdom (21).
Carriages, Wagons, and parts ...		20,813	Germany (14).
		287,371	

V.—Natural Resources.**A.****1.—AGRICULTURE.**

Sugar.—The whole economic life of Mauritius is bound up with the cultivation of the sugar-cane. Almost 30 per cent. of the whole area of the Island is under cane, and sugar represents over 97 per cent. of the total domestic exports of the Colony (the figure is even higher, if the exports of the Dependencies are disregarded).

In 1933, owing to better market conditions, the area under sugar-cane increased by 4,249 acres on the previous year's figure of 133,867 acres, bringing the total to 138,116 acres.

The total area in 1933 was distributed as follows:—

	<i>Acres.</i>	<i>Acres.</i>	<i>Percentage.</i>
Estates with mills—			
Estate plantations	53,790		
Planters on estates	5,437	59,227	42·9
Estates without mills—			
Estate plantations	34,866		
Planters on estates	3,593	38,459	27·8
Independent planters	—	40,430	29·3
		<u>138,116</u>	<u>100</u>

Of the estate plantations some 10,000 acres are Indian-owned, and of the area cultivated by planters on and off estates some 42,519 acres are cultivated by Indians. The total area of Indian cane cultivation is therefore 52,519 or 38 per cent. of the whole area under cane.

The total amount of cane harvested in 1933 was 2,287,495 long tons from which 257,330 long tons of sugar was extracted. Of this total raw sugars represented 87·7 per cent., granulated sugars (*vesous*) 11·8 per cent., and low grade sugars about 0·5 per cent. It will be seen that more than half the cane is bought by the mills from outside producers, usually on the basis of a share in the actual realized value of the sugar produced from it.

The total amount of sugar produced during recent years is returned as follows:—

	<i>Long tons.</i>		<i>Long tons.</i>
1929	234,243	1932	243,315
1930	216,610	1933	257,330
1931	161,436		

The reduction of output in 1931 was due to an exceptionally violent cyclone which visited the Colony in March and is estimated to have caused a reduction of the crop by about 33 per cent.

Climatic conditions during 1934 have been very unfavourable and it is anticipated that the crop will only amount to about 175,000 tons.

About 10,000 tons of sugar is consumed locally and the remainder is exported. Exports during recent years have been as follows:—

	<i>Quantity in tons.</i>	<i>Value in £</i>		<i>Quantity in tons.</i>	<i>Value in £</i>
1929	273,391	3,705,580	1932	194,772	1,978,914
1930	182,570	1,863,470	1933	223,071	2,311,450
1931	175,983	1,667,247			

The discrepancies between annual output and exports are due to fluctuations in local stocks and the difference between the crop year and calendar year. The Mauritius Sugar Syndicate, which was founded in 1919, now sells about 95 per cent. of the whole crop.

Exports are sent almost exclusively to those countries in which Empire sugar enjoys a preference, viz.:—the United Kingdom and Canada. Since the Budget of 1932, the bulk of the sugar has been exported to the United Kingdom.

Mauritius "raw" sugar is manufactured to a higher degree of purity than most raw sugar, polarizing nearly 99° as compared with the usual 96°, and may be regarded as semi-refined; some of it goes direct into consumption without further refining.

The reaping season lasts from about August till December and the bulk of the sugar produced is exported during this period. While stocks are occasionally retained in the Colony for some months after the end of the season sugar is usually shipped as produced and no large stocks are normally held in the Island.

During 1933 there were 42 sugar factories in operation, their output being as follows:—

	<i>Tons.</i>		<i>Tons.</i>
1	15,000	14	5-7,000
8	7-10,000	19	under 5,000

Most of the mills are highly efficient. The cost of production was reported in 1930 to be 13s. per cwt. f.o.b., but considerable reductions have since been made by drastic reductions in wages and economies in both field and factory. It was recently reported that in 1932 the average cost of production was in many cases below the average price realized, approximately 9s. 3d. per cwt.

Research into various problems connected with the production of sugar, including cane-breeding, is being actively pursued by the Mauritius Sugar Research Station, established with assistance from the Empire Marketing Fund.

Distillation of alcohol from molasses is increasing in importance in Mauritius and experiment and research in this by-product is being continued.

The quantities of rum distilled during the past five years have been:—

<i>Year.</i>	<i>Quantity. Gallons.</i>	<i>Year.</i>	<i>Quantity. Gallons.</i>
1928-29	197,205	1931-32	163,604
1929-30	199,790	1932-33	243,154*
1930-31	135,982		

553,287 litres (121,712 gallons) of rum were issued for human consumption and 480,554 litres (105,712 gallons) were issued as industrial alcohol.

36,489 litres (8,026 gallons) of rum valued at £585 were exported during 1933.

Seven distilleries were in operation, employing 75 hands in all.

Compared with sugar, other agricultural products are relatively unimportant.

* Increase due to rise in quantity of alcohol denaturated for power purposes.

Hard fibre.—Some 20,000 acres are under aloe or “Mauritius hemp” mostly in a wild state. The fibre is extracted locally.

Exports in recent years have been as follows:—

		Quantity in long tons.	Value in £			Quantity in long tons.	Value in £
1929	...	2,411	62,136	1932	...	417	6,042
1930	...	1,446	26,092	1933	...	415	6,585
1931	...	448	6,923				

The reduction in export since 1931 is due chiefly to the severe fall in price.

In 1931 a factory for the manufacture of bags from Mauritius hemp commenced operations. The company at first experienced many difficulties but there are now prospects that its business will improve. The number of people employed is 150 females and 20 males. The company has been helped by a loan from the Colonial Government.

Coconuts.—Little attention is paid to the cultivation of the coconut palm in Mauritius, the total area under the palm being about 500 acres with a total output of 100,000 to 150,000 nuts a year, but it is the only industry of importance in those dependencies known as the “Oil Islands” (Agaléga, Diego Garcia, Peros Banhos, etc.). The greater part of the copra exported from the Colony is produced in these islands. The copra is not graded and the quality is inferior to that of Malaya.

Exports of copra in recent years have been as follows:—

		Quantity in long tons.	Value in £			Quantity in long tons.	Value in £
1929	...	1,368	21,063	1932	...	1,719	21,659
1930	...	1,706	21,027	1933	...	1,184	15,104
1931	...	2,519	29,658				

Exports of other coconut products, coconut oil, fresh coconuts, etc., are negligible and local consumption is not of great importance.

Tobacco has been grown in Mauritius, at any rate since the middle of the 19th Century, but until 1925 the area under cultivation was very small. In 1916 it was about 9½ acres and at the end of 1925 250 acres. In 1916 the Department of Agriculture started making experiments and in 1919 a Government Tobacco Factory was organized. In 1926 cultivation began to increase rapidly and in May, 1926, the British American Tobacco Company (Mauritius) Limited opened a factory using both local and imported leaf. In 1927 the Government Factory was closed and converted into a Grading Warehouse, and export of ungraded tobacco was prohibited. There are now eight factories in the Island, all in Port Louis, employing 128 men and 93 women. Except for the British-American Tobacco Company's factory, all are owned and managed by Chinese. In 1928 production was much in excess of consumption, and 187 bales were shipped to London; but only 36 bales were sold and the rest had to be returned to Mauritius as being of too low a quality to sell in the United Kingdom.

In view of this and other difficulties of over-production of low quality tobacco, a Committee of Investigation was set up, which recommended an extension of experimental and instructional work and the formation of a central marketing organization. In consequence of these recommendations and in pursuance of legislation passed in 1930, a Government Tobacco Board consisting of officials and representatives of the growers and the commercial community was appointed in February, 1932, for the control of production and sale of leaf in the Colony and the Government Tobacco Warehouse was vested in the Board. The Board was given *inter alia* powers to limit the area to be put under tobacco in each crop year (May to April). The capital required by the Board has been advanced from Government funds. The tobacco produced by planters is purchased by the Board and received, conditioned and graded at the Warehouse. The leaf comes forward all the year round with the peak in December and a low point in May to July. It is baled in the warehouse before being sold to the manufacturer, the average weight of the bale being about 60 kilos. Excise tax is paid before the tobacco is delivered to manufacturers.

All land planted with tobacco must be registered. The area under cultivation during recent years has been as follows:—

Crop Year.	Flue-cured Acres.	Air cured Acres.	Total. Acres.
1929-30 (estimated) ...	—	—	2,650
1930-31 (estimated) ...	—	—	3,000
1931-32 ...	—	—	1,771
1932-33 ...	528	768	1,296
1933-34 ...	981	1,100	2,081
1934-35 (authorized) ...	825	275	1,100

Of the area authorized for 1934-35, 75 acres of the Flue cured and 25 acres of the Air cured areas were registered for the purpose of growing tobacco or export with a view to testing the market. The reduction in the area authorized for the production of tobacco for the home market was due to the unexpectedly large size of the crop in 1933-34. The area actually planted to the end of October, 1934, was 676 acres of Flue cured and 245 acres of Air cured, a total of 921 acres.

The total quantity of tobacco produced in the last two seasons is shown below. In 1932-33 the Flue cured averaged a value of about Rs.1.51 c. per kilo and the Air cured about 69 cents per kilo. Two bales were exported in 1932 for exhibition at the British Industries Fair. In 1933-34 the average values were Rs.1.58 c. and 87 c. per kilo respectively. The quantity of tobacco manufactured during 1932 amounted to 308,000 kilos (262,106 kilos of cigarettes and 27,636 kilos of pipe tobacco). Only about 21,200 kilos of imported tobacco was used in 1932, the remainder in excess of the supplies received during the year being derived from stocks,

The following table shows the grading of the last two crops. It will be noticed that in 1933-34 some difficulty was experienced in preparing the Flue cured crop and that there was some falling off in quality owing to its large volume, but that there was a marked improvement in the quality of the Air cured crop.

Grades.	Flue cured				Air cured.			
	1932-33		1933-34		1932-33		1933-34	
	Kilos.	Per cent.	Kilos.	Per cent.	Kilos.	Per cent.	Kilos.	Per cent.
Bright ...	13,421	9.55	9,129	2.91	21	0.03	1	—
Medium ...	61,917	44.02	143,267	45.62	2,975	4.96	9,932	4.15
Red ...	—	—	—	—	14,828	24.68	128,938	53.84
Dark ...	50,959	36.23	140,268	44.71	28,902	48.12	63,932	26.69
Green ...	2,469	1.75	4,813	1.61	5,955	9.92	5,561	2.31
Scrap ...	11,887	8.45	16,204	5.15	7,384	12.29	31,177	13.00
Total ...	140,654	100.	313,681	100.	60,065	100.	239,541	100.

Under the legislation governing the industry, permits are delivered to would-be growers who must sell their produce, at rates fixed according to grades, to the Government Tobacco Warehouse. The number of permits thus given is regulated by the requirements of the local cigarette manufacturers with whom the Warehouse deals directly.

The value of the tobacco purchased by the Warehouse was Rs.207,842 in 1932 and Rs.681,604 in 1933. Previous to the organization of the Warehouse the grower sold direct to the manufacturer and the monetary value of transactions could not be controlled.

Tea.—The import duty of 1932 has not resulted in any rise in the price of imported tea but appreciable progress is in evidence in relation to tea growing. The production for the past five years has been as follows:—

	lb.		lb.
1928-29 ...	26,000	1931-32 ...	29,377
1929-30 ...	28,878	1932-33 ...	44,503
1930-31 ...	36,426		

the value being about Rs.1 per lb. The yield per acre averages about 700 lb. The reduction in 1931-32 was due to the cyclone which swept the Island.

Food crops.—Continuous efforts are made to encourage the growth of food crops in the Colony and, with the present low prices of sugar, the Indian peasant has returned to a certain extent to this form of cultivation.

The following table shows the areas under food crops in 1933 and the estimated quantity of the output:—

	Acres.	Long tons.
Vegetables ...	4,000	unascertainable
Manioc ...	1,500	7,000
Maize ...	1,200	1,200
Bananas ...	700	700
Potatoes ...	300	600
Sweet potatoes ...	200	600
Hill rice ...	80	unascertainable
Groundnuts ...	100	100
Various ...	800	—

Pineapples.—After a period of hesitation, the public is now taking a somewhat more active interest in the pineapple industry. A Committee has been formed to co-ordinate effort in this respect. Arrangements have been made for the propagation of the Smooth Cayenne variety and about 50 acres are actually planted. A regular supply of fruit was delivered at the canning factory, Port Louis, and in 1933 the output of the factory was 119,500 kilos of pineapple preserves.

The "Granravien" Canning Factory continued its activities during 1932 and produced a number of canned goods and preserves. Exports however are still inconsiderable.

2.—FORESTRY.

Over one quarter of the area of the Colony is covered with scrub and high forest, which supply plentiful and cheap firewood and charcoal. Some thousands of acres of plantations, on Crown and private land, provide from one quarter to one half of the timber used locally. All felling areas are replanted to provide for the maintenance of supplies of timber and fuel.

3.—ANIMAL HUSBANDRY.

Mauritius contains only about 5,000 to 6,000 acres of pasturage and this fact limits the amount of stock which can be raised. The prevalence of "surra" is also a limiting factor. On balance, in fact, Mauritius is a substantial importer of live-stock, 5,652 bullocks valued at £26,590 having been imported for slaughter, mostly from Madagascar, in 1933.

At the end of the year the following live-stock was maintained on estates:—

Horses, mules, and asses ...	235	Pigs ...	1,726
Cattle ...	14,247	Goats ...	4,665
Sheep ...	1,308		

About 1,500 tons of beef valued at about £75,000 is produced annually.

Imported cattle are cheaper than those produced locally, but an endeavour is being made to produce a beef type of bovine instead of the existing draught type.

About 20 tons of butter are produced annually, but it is doubtful whether it can compete in price with the imported article. About 220,000 gallons of liquid milk are marketed annually.

Pen manure finds a ready sale, demand being substantially in excess of supply.

The hides and skins of the animals slaughtered are readily absorbed by the local market.

4.—MINERAL.

No official geological survey of Mauritius has ever been made. Iron-ore is known to exist in small quantities in certain localities but has not been worked for many years past.

A certain amount of building stone is quarried for local use, but the quantity is not ascertainable.

5.—FISHERIES AND MARINE PRODUCTS.

There is a small fishing industry which caters entirely for the local market. Fish are abundant in the small archipelagos forming the dependencies of Mauritius. At Rodrigues and in the Gargados Carayos group fish are cured and supplied to Mauritius.

The fishing population of the Colony is estimated at 1,336 of whom 384 are net fishermen and 952 basket net and line fishermen. In addition to this, some 900 non-professional fishermen are employed in hauling seines.

Thirty decked pinnaces and 1,403 pirogues form the entire fishing fleet, all of these vessels being worked with sails and oars. In addition to this, approximately a dozen boats are owned by amateur fishermen, and amateur fishing, particularly of the deep-sea variety, is on the increase.

Upon the advice of the Fisheries Permanent Advisory Committee, net fishing during the spawning season, which extends from October to January, has been prohibited.

B.

Food Supply.

The Colony is in no sense self-supporting in foodstuffs, large quantities of rice and other articles being imported annually. While the fall in the price of sugar has encouraged the cultivation of certain foodstuffs, any attempt to make the Colony self-supporting would produce an enormous dislocation in the economic life of the community and probably in their customary diet, since rice, to the extent to which it is now imported, could not be grown locally.

By far the most important imported foodstuff is rice of which 49,920 tons, valued at £369,273, were imported in 1933 almost entirely from India.

India, too, is the country of origin of the other most important foodstuffs, edible oils and dholl, but substantial quantities of certain oils are imported from China, and most of the flour (of which 9,312 tons valued at £73,171 were imported in 1933) comes from Australia.

VI.—Industry.

The only industry of first-rate importance in the Colony is the sugar-cane crushing industry of which particulars have been given above. Well-equipped engineering establishments exist in the Colony for the production of sugar-crushing machinery and for the necessary repairs to sugar factories.

Other industries are little developed and provide solely for the needs of the local population and not for the export market.

The most important of these industries are the following:—

Industry.	Establishments.	Persons employed.
Engineering ...	48	500
Electrical plants ...	4	400
Bakeries ...	65	300
Cabinet-makers ...	101	350
Match factory ...	1	100
Lime burning ...	31	100
Salt making ...	4	100
Cigarette factories ...	8	100

There are also a number of less important industries, e.g., aerated water-works, ice making, vinegar making, leather tanning, pottery, boot and biscuit making; and there are establishments of an industrial nature connected with the railway.

VII.—Other Economic Activities.

The entrepôt trade and the tourist industry are of negligible importance in Mauritius.

VIII.—Communications.

Mauritius is provided with an excellent road system consisting of some 700 miles of public roads, most of which are suitable for motor traffic. All the roads are metalled and 140 miles are bitumen-coated. Practically all the main roads are open to heavy motor vehicles and the following vehicles were in use at the end of 1933:—

- 1,471 private motor cars.
- 322 lorries.
- 267 motor taxis.
- 183 motor cycles.
- 122 motor omnibuses.

The motor omnibuses provide a good service to the most remote parts of the island at an average charge to passengers of about one-third of a penny per mile.

There is a considerable lorry traffic which has been a source of much embarrassment to the Railway.

The Mauritius Government Railways maintain 140½ miles of open line (4' 8½" gauge) with 13½ miles of subsidiary light railway (2' 6" gauge). About 13½ miles of the main line are open to goods traffic only. A large part of the railway traffic is the transport of sugar-cane and sugar during the crop season.

The Railway which had been working at a serious loss for many years—for the seven years ended 30th June, 1933, the average annual loss shown was Rs.491,904 in which sum is included an average expenditure of Rs.259,253 on renewals—has for the year ended 30th June, 1934, shown a profit amounting to Rs. 139,832, the amount spent on renewals being Rs.22,103.

The advance made by the Treasury to the Railway has been reduced during 1933-34 by Rs.33,767 and at 30th June, 1934, stood at Rs.1,678,797-60. On this advance no interest is charged by the Treasury.

The adjustment of the traffic requirements of the Colony as between road and rail is under consideration by Government.

A Transport Board formed in 1932 limits and controls road transport in so far as it is excessive or runs uneconomically.

There is an extensive system of private steam tramways on certain sugar estates for the conveyance of canes from the field to the factory and of sugar from the factory to the railway station. Some 1,000 miles of line were in use in 1933.

Port Louis, the capital of the Colony, possesses the only navigable harbour for ocean-going ships, which is situated on the north-west coast. A wide break in the ring of coral reefs surrounding the island, caused by the meeting of several rivers and streams gives access to the harbour, which has been dredged so as to provide deep-water accommodation for ten ships lying at berths in the channel and drawing from 24 to 31 feet of water. The mountains of the range behind Port Louis, including the Pouce 2,661 feet, and Pieter Both, 2,690 feet, are guiding beacons to ships by day. The lighthouses on Flat Island, the Colony's quarantine station six miles north of Mauritius and Caves Point, five miles south of Port Louis on the Cliff's edge, and the gas buoy to the north of the outer harbour entrance, direct ships approaching Port Louis by night.

Communications with the Dependencies are regular but infrequent. There is a steamer service to Rodrigues at two-monthly intervals and a sailing vessel service to the Oil Islands at three-monthly intervals. Other vessels also call at the Dependencies from time to time.

Communication with the outer world is maintained by two main routes. There is a regular fortnightly service of the Messageries Maritimes, which operates between France and Mauritius calling at Aden, Mombasa, and other East African ports, Madagascar and Reunion *en route*. The average time taken by the mails from England to Mauritius by this route is about 39 days.

The alternative route is via South Africa where there is a connexion with the regular South African mail steamers. South Africa is reached from Mauritius by the following services:—

- (1) The Royal Packet Navigation Company of Batavia monthly service between Java and South Africa via Mauritius, inaugurated in 1931.
- (2) The Clan Line service, approximately once a month.
- (3) Occasional sailings of Union-Castle and British India cargo steamers.

By the Dutch service and with convenient connexions at Durban, England can be reached in 28 days by the South African route but the average time of transit of mails by this route in 1933 was about 32 days.

Altogether 2 British sailing vessels of 426 net tons, 104 British steamers of 318,243 net tons and 98 foreign steamers (44 French, 36 Dutch, 8 Norwegian, and 10 others) of 304,529 net tons entered at Port Louis in 1933.

In 1933 187 vessels brought mails to Mauritius and 161 vessels carried mails to overseas ports.

Mails are despatched by the African air-mail when convenient connexions with Johannesburg or Nairobi are available.

IX.—Tariff.

Duties are levied on all imports except those specially exempted for particular reasons. Specific or special *ad valorem* rates are levied on a long list of articles covering most of the principal imports. All other goods are subject to a general duty of 13·2 per cent. *ad valorem*.

Imperial Preference is granted on a number of items, mainly manufactured goods, and excluding principal foodstuffs, at varying rates. The preference granted in 1932 on goods imported from the United Kingdom and Canada was extended with effect from the 11th July, 1933, to include goods imported from the remainder of the Empire.

X.—Trade Representatives.

Mauritius has no official trade representatives overseas; but many of the functions of such a representative (e.g., management of Mauritius displays at trade exhibitions) are discharged by the London representative of the Mauritius Chamber of Agriculture, Sir Louis Souchon, 21, Mincing Lane, E.C.

SEYCHELLES.

I.—Situation, etc.

The Colony of Seychelles consists of the Seychelles Islands proper, lying between longitude 55° and 56° East and latitude 4° and 5° South in the Indian Ocean, and a number of smaller islands spread out to the south-west.

The total number of islands in the Colony is 92 with an aggregate area of about 100,000 acres (or 156½ square miles).

These may be divided into the following categories:—

- (1) Granitic islands, including the principal islands, the Mahé and Praslin groups.
- (2) Coral islands:—
 - (a) low-lying flat islands,
 - (b) elevated reefs still in this position of growth.

Mahé, the largest and most populous island, 55 square miles, is 934 miles from Mauritius, 600 from Madagascar, and 970 from Zanzibar.

Of the total area of the Colony rather over half is private property, comprising 1,644 separate holdings, of which 1,216 are under 10 acres and only 6 over 1,000 acres. Nearly half the land in private possession in fact is held in small holdings, and with the continued division of estates which results from the provisions of the local law there is a tendency for the number of small estates to increase.

Of the Crown lands parts are leased for the collection of cinnamon leaves and part for the cultivation of coconuts.

The Aldabra group of coral islands is leased to the Seychelles Company for the extraction of guano, the exploitation of mangrove bark and the cultivation of maize, cotton, etc.

The climate of Seychelles is quite healthy and there is no malaria. There is little variation in temperature, the thermometer seldom rising above 86° F. or falling below 74° F.; the hottest weather occurs during March and April.

The rainfall averages about 90 inches, but in some years has reached 115 inches. In 1933 the total was 79·74 inches; showers occurred throughout the year. The heaviest rainfall occurred during the months from October to March. The Colony is free from cyclones.

II.—Population.

At the census of April, 1931, the population was 27,444, of whom 503 were Indians, 235 Chinese, and the remainder Europeans, Africans, and persons of European, African, and mixed descent. The population has increased steadily during recent years and on the 31st December, 1933, was estimated at 28,731.

It was estimated at the same date that some 8,821 persons were engaged in agriculture, 1,200 in fisheries, and 582 in commerce.

With the steady growth of population emigration is becoming increasingly important in the life of the community.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The unit of coinage is the rupee, equivalent to 1s. 6d. sterling, divided into 100 cents.

The coinage in circulation is Indian silver and Mauritius silver and copper coinage. There is a local issue of currency notes and Mauritius and Indian currency notes are also in circulation but are gradually being withdrawn. It is proposed to terminate the legal tender of Mauritius notes in the near future on the occasion of the proposed issue of a new series of notes by the Mauritius Government, and proposals are under consideration for making the standard coin in future a Seychelles rupee linked to sterling at the rate of 1s. 6d. in lieu of the Indian rupee.

2. There is a Government Savings Bank in the Colony, but no other banking institution. The number of depositors on the 31st of December, 1933, was 819 and the total amount standing to their credit Rs.181,857.

3. The Government has made advances for varying terms to planters amounting in all to Rs.293,230. It has also advanced Rs.21,098 to other local business concerns and made a special advance of Rs.199,926 to the trustees of a very large local estate. (Figures given as at 31st December, 1933.)

The Government undertakes the sale of foreign drafts, in the absence of a bank.

B.—PUBLIC FINANCE.

1. There is no Public Debt.

2.—(a) *Analysis of Revenue (on the basis of actual results for 1933).*

Self-Balancing Department.

	<i>Revenue.</i>	<i>Expenditure.</i>
	Rs.	Rs.
Post Office	20,890	18,872
	Net Surplus Rs.2,018.	

General Revenue.

	Rs.	Percentage.
1. Customs	267,678	47·85
2. Inland Revenue	164,525	29·60
3. Fees of Court, etc.	35,879	6·45
4. Interest	33,987	6·20
5. Rents, etc., of Government Property	22,485	4·05
6. Miscellaneous	31,134	5·50
7. Surplus on self-balancing Department	2,018	·35

Equivalent to £41,828... ..	557,706	100·0
Revenue of self-balancing Department set-off against		
Expenditure	18,872	
Revenue from Colonial Development Fund... ..	15,465	

Rs. 592,043

(b) *Analysis of Import Duties for 1933.**Amount of duty collected on articles imported from:—*

					<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
					<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
<i>Class</i>	<i>I.</i>	...	...	...	37,260	80,796	47,978	166,034
	<i>II.</i>	...	...	...	188	185	440	813
	<i>III.</i>	...	...	...	21,842	12,251	47,169	81,262
	<i>IV.</i>	...	...	...	5,148	451	1,900	7,499
					<u>64,438</u>	<u>93,683</u>	<u>97,487</u>	<u>255,608</u>
Equivalent to	...	...	...	...	<u>£4,833</u>	<u>£7,026</u>	<u>£7,312</u>	<u>£19,171</u>

3. Expenditure (on the basis of actual results for 1933).

					<i>Rs.</i>	<i>Percentage of Total.</i>
1. Loss on self-balancing departments	...	...	...	...	—	—
2. Debt charges	...	...	...	...	—	—
3. Administration	...	...	...	...	316,764	50·8
4. Economic Development	...	...	...	...	58,669	9·4
5. Social Services	...	...	...	...	195,784	31·4
6. Defence	...	...	...	...	—	—
7. Non-effective, i.e., Pensions	...	...	...	...	52,114	8·4
Equivalent to £46,750					<u>623,331</u>	<u>100·0</u>
Expenditure of self-balancing Department set-off against Revenue					18,872	
Expenditure from Colonial Development Fund					<u>16,346</u>	
					<u>658,549</u>	

4. Reserve Funds, etc.

There is no Reserve Fund.

On the 31st December, 1933, the Government's excess of Assets over Liabilities was Rs.321,695, but none of this was liquid as it is exceeded by the amount lent as stated in Section III (A) (3) above, and the Colony has in fact an overdraft with the Crown Agents exceeding the value of the marketable securities held.

5. Grants-in-aid.

No grant-in-aid or loan-in-aid has been received or asked for, except from the Colonial Development Fund, from which the following grants and loans have been or are being received:—

					<i>1931.</i>	<i>1932.</i>	<i>1933.</i>	<i>1934.</i>
<i>Grants.</i>					<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
Improvement of Roads	...	...	...	...	24,667	—	—	—
Construction of Tubercular Ward	...	...	...	...	5,333	—	—	—
Surgical Apparatus for Medical Department	...	...	...	...	5,147	—	—	—
Fertilisers for Experimental Plots	...	...	...	...	4,146	320	—	6,666
Assistant Director of Agriculture	...	...	...	...	—	7,200	6,667	1,667
Visit of Expert Distiller	...	...	...	...	—	12,333	3,500	—
Afforestation	...	...	...	...	—	—	—	23,200
Propagation of plants	...	...	...	...	—	—	—	13,333
Sericulture industry	...	...	...	...	—	—	—	2,000
					<u>Rs. 39,293</u>	<u>Rs. 19,853</u>	<u>Rs. 10,167</u>	<u>Rs. 46,866</u>
<i>Loans.</i>								
Fertilizers to Planters	...	...	...	...	<u>8,333·33</u>	—	—	—

IV.—Trade Statistics.**EXPORTS.**(i) *Total exports (including Bullion and Specie) to:—*

					<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
					<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>	<i>Rs.</i>
1913*	...	...	...	...	663,076	143,273	1,677,853	2,484,202
1930	...	...	...	...	277,948	875,168	907,209	2,060,325
1931	...	...	...	...	520,934	164,688	422,111	1,107,733
1932	...	...	...	...	350,861	688,682	311,540	1,351,083
equivalent to	...	...	...	...	£26,315	£51,651	£23,365	£101,331
1933	...	...	...	...	390,681	294,465	218,835	903,981
equivalent to	...	...	...	...	£29,301	£22,085	£16,413	£67,799

* In 1913, 1 Rupee = 1s. 4d.

(ii) *Domestic Exports by Classes, 1933.*

To					Class I.	Class II.	Class III.	Class IV.	Total
					Rs.	Rs.	Rs.	Rs.	Merchandise. Rs.
United Kingdom ...	...	...	...	...	12,692	370,868	7,121	—	390,681
India ...	...	...	...	...	1,108	144,676	—	—	145,784
New Zealand ...	...	...	...	...	—	112,940	—	—	112,940
Mauritius ...	...	...	...	...	1,545	11,290	163	—	11,998
Ceylon ...	...	...	...	...	—	9,000	—	—	9,000
Rest of Empire ...	...	...	...	...	4,822	6,901	—	—	11,723
Total Empire ...	...	...	...	...	19,167	655,675	7,284	—	682,126
United States of America ...	...	...	...	...	—	—	181,466	—	181,466
Germany ...	...	...	...	...	—	—	19,690	—	19,690
France ...	...	...	...	...	8,932	4,040	—	—	12,972
Other foreign countries ...	...	...	...	...	4,675	32	—	—	4,707
Total foreign countries ...	...	...	...	...	13,607	4,072	201,156	—	218,835
GRAND TOTAL ...	...	...	...	...	32,774	659,747	208,440	—	900,961
Equivalent to ...	...	...	...	...	£2,458	£49,481	£15,633	—	£67,572

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>		<i>Total Quantity.</i>	<i>Total Value. Rs.</i>	<i>Principal countries of destination, with amounts in Rs.'000.</i>
<i>Class I.</i>				
Birds Eggs' yolk liquid	...	56 tons	8,932	France (all).
Calipee	... ..	94 cwt.	8,415	United Kingdom (all).
<i>Class II.</i>				
Copra	... ..	3,217 tons	408,315	United Kingdom (267), India (136), Mauritius (5).
Guano	... ..	12,307 „	215,987	New Zealand (113), United Kingdom (76), Ceylon (9), Kenya (6), Mauritius (6), India (5).
Tortoise Shell (Caret)	...	24 cwt.	25,401	United Kingdom (21), France (4).
<i>Class III.</i>				
Essential Oils—				
Cinnamon bark	... ..	64 lb.	1,100	United Kingdom (all).
Cinnamon leaf	... ..	133,785 „	201,156	United States of America (181), Germany (19).
Lemon grass	... ..	86 „	156	United Kingdom (all).
Patchouli	... ..	1,355 „	5,865	United Kingdom (all).
		135,290 „	208,277	

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from*

United Kingdom. Rest of Empire. Foreign Countries. Grand Total.

	Rs.	Rs.	Rs.	Rs.
1913* ...	422,755	589,208	267,979	1,279,942
1930 ...	530,034	596,959	504,064	1,631,077
1931 ...	328,107	410,703	333,148	1,069,958
1932 ...	273,166	399,163	335,782	1,008,111
equivalent to ...	£20,487	£29,937	£25,184	£75,608
1933 ...	256,478	291,529	286,936	834,943
equivalent to ...	£19,236	£21,865	£21,520	£62,621

(ii) *Imports by Classes, 1933.*

From					Total
	Class I.	Class II.	Class III.	Class IV.	Merchandise. Rs.
United Kingdom ...	51,600	1,108	173,610	30,280	256,478
India ...	191,505	1,056	53,225	1,217	247,003
Australia ...	16,850	—	—	—	16,850
Kenya ...	11,754	109	—	1,442	13,305
Rest of Empire ...	5,577	61	8,733	—	14,371
Total Empire ...	277,186	2,334	235,568	32,919	548,007
Japan ...	—	—	63,039	—	63,039
Dutch Possessions ...	23,207	1,313	27,897	—	52,417
Portuguese Possessions ...	45,389	—	—	—	45,389
France ...	15,934	—	17,562	5,247	38,743
Other foreign countries ...	48,053	4,923	32,914	1,458	87,348
Total foreign countries	132,583	6,236	141,412	6,705	286,936
GRAND TOTAL ...	Rs.409,769	Rs.8,570	Rs.376,980	Rs.39,624	Rs.834,943
Equivalent to ...	£30,733	£643	£28,273	£2,972	£62,621

* In 1913 1 Rupee = 1s. 4d.

(iii) *Principal Imports, 1933.*

<i>Article.</i>				<i>Total Quantity.</i>	<i>Total Value. Rs.</i>	<i>Principal countries of origin with amounts in Rs. '000.</i>
<i>Class I.</i>						
Rice	...	...	...	2,286 tons	157,064	India (153).
Sugar	...	...	...	639 "	68,596	Portuguese Possessions (45), Dutch Possessions (23).
Flour (wheaten)	...	...	...	248 "	26,052	Australia (15), India (11).
Coffee	...	...	...	1,162 cwt.	24,372	Arabia (21).
Wine (all kinds)—						
In bottles	...	...	...	359 doz. bottles.	6,819	France (5).
In Casks	...	...	...	9,914 gal.	14,360	Spain (11), France (3).
					21,179	
Spirits (all kinds)	...	...	...	2,963 gal.	17,919	United Kingdom (12), Mauritius (3).
Tobacco—						
Cigarettes	...	...	...		14,120	United Kingdom (all).
Manufactured	...	...	...	291 lb.	825	United Kingdom (all).
					14,945	
Dhall and Lentils	...	...	...	1,610 cwt.	9,470	India (all).
<i>Class III.</i>						
Cotton Manufactures—						
Piece Goods	...	...	...	564,665 yds.	84,704	Japan (40), India (28), United Kingdom (15)
Sewing thread	...	...	...		12,030	United Kingdom (10).
					96,734	
Oil—						
Motor Spirit	...	...	...	17,703 gal.	20,579	Dutch Possessions (19).
Kerosene	...	...	...	24,498 "	12,325	Dutch Possessions (7), United Kingdom (5).
Lubricating...	...	...	...	4,035 "	2,946	Dutch Possessions (2).
				46,236 "	35,850	
Machinery	...	...	...		20,935	United Kingdom (all).
Haberdashery...	...	...	...		16,237	United Kingdom (7), India (3).
Boots and Shoes	...	...	...	11,817 prs.	12,780	Japan (5), Czecho-Slovakia (3), United Kingdom (3).
Drugs	...	...	...		12,427	United Kingdom (9), France (3).
Corrugated Iron Sheets	...	...	...		10,030	United Kingdom (all).

V.—Natural Resources.

A.

1. AGRICULTURE

The principal resources of the Colony are agricultural.

Some 28,240 acres are under coconut palms, the area being distributed as follows:—

	<i>Acres.</i>							
(1) Granitic islands—								
Mahé group	...	...	...	...	...	...	...	15,000
Praslin group	...	...	...	...	...	...	...	7,140
(2) Coral islands	...	...	...	...	...	...	...	6,100
								28,240

The exports of coconut products consist almost entirely of copra.

The greater part of the crop is grown on the granitic islands; it is estimated that the coral islands produce an average crop of 1,450 tons of copra. The output of the coral islands has recently shown a tendency to increase and that of the granitic islands to decrease owing to the prevalence of scale insect pests.

The following tables show the principal statistics of production, consumption and exports of coconuts and coconut products:—

	<i>Production.</i>	<i>Local Consumption.</i>	<i>Exports.</i>	<i>Exports.</i>	<i>Exports.</i>	<i>Exports.</i>	<i>Exports.</i>	<i>Exports.</i>
	<i>Nuts.</i>	<i>Nuts.</i>	<i>Copra.</i>	<i>Copra.</i>	<i>Coconut Oil.</i>	<i>Coconut Oil.</i>	<i>Coconuts.</i>	<i>Coconuts.</i>
			<i>Tons.</i>	<i>£</i>	<i>Gallons.</i>	<i>£</i>	<i>No.</i>	<i>£</i>
1929	35,960,200	4,000,000	4,560	86,273	220	31	242,600	621
1930	46,426,500	4,000,000	5,909	90,428	1,719	227	—	—
1931	38,265,717	4,000,000	4,875	49,939	784	66	45,717	75
1932	38,145,680	4,000,000	4,680	59,235	2,295	219	89,000	150
1933	27,608,658	4,000,000	3,216	30,850	1,772	150	46,658	68

The copra, which is not graded, commands a relatively good price on the market. In quality it ranks as being slightly below that of Ceylon.

There is considerable scope for improvement in local methods of cultivation and the reduction of scale diseases. With the assistance of the grants from the Colonial Development Fund referred to above, a good deal of work is now in progress to this end, but so far very little improvement has taken place in the method of cultivation, and the yields have not shown any marked increase.

The average yield of nuts per palm is estimated at about 16, a low figure. The nuts are small and about 6,600 are required to make a ton of copra.

The Colony is well suited to the coconut and it is estimated that with improved methods of cultivation and careful manuring, the yield of copra per acre could be much increased.

In the outlying islands the copra is all sun-dried and prepared on the estates themselves. It is superior in quality to that produced in Mahé, where almost the whole is prepared (either sun-dried or dried in small stone and mortar kilns) in about 50 small factories employing about 400 persons, the nuts being purchased from various growers.

In 1933 a small proportion of the copra produced was shipped to Bombay, the remainder being sent to the European market.

The only other important agricultural industry is the production of essential oils, which first started about 1907. Methods of distillation are understood by the people, who possess an aptitude for any industry involving distillation.

The two essential oils which are produced in commercial quantities are cinnamon leaf and patchouli oil, exports of which during recent years have been as follows:—

					<i>Cinnamon leaf.</i>		<i>Patchouli.</i>	
					<i>Quantity.</i>	<i>Value.</i>	<i>Quantity.</i>	<i>Value.</i>
					lb.	£	lb.	£
1929	...	...	...	...	146,191	40,960	9,532	5,247
1930	...	...	...	...	111,285	24,639	5,161	1,844
1931	...	...	...	...	120,798	19,222	8,631	2,687
1932	...	...	...	...	109,501	14,136	5,344	1,733
1933	...	...	...	...	121,368	15,087	1,228	440

Cinnamon leaf oil is made from leaf collected from trees and bushes growing on the hill slopes of Mahé and some of the other granitic islands. The area so utilised in 1933 was about 4,000 acres, but there are still small areas from which leaves are not collected. The leaves are gathered by women and taken green to the distilleries of which there are about 40, mostly in Mahé. The distilleries are generally small, and the average output is about 7 litres (say about 15 lb.) per ton of leaves treated, though yields as high as 10 to 12 litres (22 to 26 lb.) have been secured from the older leaves; and it is estimated that with improved stills the average yield might be increased.

The following table shows the exports of Cinnamon bark and Cinnamon bark oil during the last five years:—

<i>Cinnamon bark.</i>			<i>Cinnamon bark oil.</i>	
<i>Tons.</i>	<i>£</i>	<i>lb.</i>	<i>£</i>	
1929	94	758	—	—
1930	71	428	—	—
1931	34	228	6	6
1932	97	586	66	107
1933	64	388	64	82

Patchouli oil is produced from plants grown in cultivated areas on coconut estates. There is some room for improvement in methods of production.

Research work into Essential Oil plants has been carefully carried out by the Agricultural Department and greatly assisted by the Imperial Institute. The following have been recently verified as plants of possible economic value existing in Seychelles:—Lemon grass, Palmarosa and Citronella. Verification of the commercial value of the varied oil-containing grasses found in this Colony is now completed, and investigation into the possibilities of the 7 species of *Ocimum* existing in Seychelles is now in progress. To encourage and protect the various oils produced, a bonus has been offered on the export of certain oils and, with the exception of Cinnamon leaf oil, all oils are now subject to examination prior to export, in order to create and safeguard the name and quality of the oils produced in Seychelles. In order to protect the valuable grasses and avoid contamination it is proposed to eradicate all ginger grass in the areas of oil production.

An expert in the distillation of essential oils recently spent one year in the Colony to investigate and advise upon methods of distillation; his expenses were met from a Colonial Development Fund grant.

The cultivation of vanilla has almost disappeared from Mahé, but is still carried on in some other islands. Seychelles is well suited to the cultivation of the crop and methods of cultivation and preparation are well understood. About 10 acres are under vanilla, chiefly in the island of Praslin. The industry had practically died out owing to an outbreak of root disease and the competition of synthetic vanillin, but there has recently been some revival. Exports during recent years have been as follows:—

	<i>lb.</i>	<i>£</i>
1929	10,157	1,985
1930	8,016	1,411
1931	2,160	217
1932	2,791	218
1933	999	77

The Agricultural Department has now started a large scale propagation and distribution of alternative crops such as arecanuts, cardamoms, pepper, coffee, nutmegs, *Eucalyptus citriodora* and *palmarosa*.

In addition to the above production for export, there is a good deal of agricultural production for local consumption. The principal food products are noted below in Section B. There is cultivation of sugar cane, not for the manufacture of sugar, but for the purpose of producing an alcoholic liquor peculiar to the Seychelles, known as bacca, which is produced by direct fermentation of the cane juice.

2. FOREST PRODUCTS.

Some 2,500 acres are under forest, of which 500 acres are under commercial timber, but none is at present exported.

Timber trees which are exploited are:—Takamaka (*calophyllum inophyllum*), Badamier (*terminalia catappa*), Agati (*adenanthera pavonina*), Bois rouge (*uormia ferruginea* and *Casuarina equisetifolia*). The latter is extensively planted as a source of timber and firewood.

3. ANIMAL HUSBANDRY.

The Colony contains about 25 horses, 125 asses, 1,000 cattle, 7,000 pigs, and 300 goats; and during 1933 about 625 cwt. of meat and 321 cwt. of pig-meat were produced for local consumption, as well as 3,760 lb. of hides.

4. MINERALS.

Apart from phosphatic guano, the Colony is not known to contain any minerals of commercial value. The Islands from which guano is exported are Assumption, Astove, Denis and Providence.

Exports during recent years have been as follows:—

	Quantity. Tons.	Value. £
1929	12,789	19,919
1930	15,977	28,205
1931	4,730	4,751
1932	14,213	19,768
1933	12,307	16,199

Remaining supplies are:—Assumption 52,000 tons, Astove (unknown), Denis (unknown, but required for local manuring), Providence 12,000 tons.

5. FISHERIES AND MARINE PRODUCTS.

The waters of the Colony are rich in fish and turtle, though the latter are said to be decreasing in numbers. As much as about 3,000,000 lb. of fish, valued at £87,000, are landed annually and over 400 cwt. of turtle meat is produced for local consumption. The only fishery products exported in appreciable quantities in the last five years were the following:—

	1929.		1930.		1931.		1932.		1933.	
	Quantity. Kilos.	Value. £	Quantity. Kilos.	Value. £	Quantity. Kilos.	Value. £	Quantity. Kilos.	Value. £	Quantity. Kilos.	Value. £
Tortoise shell ...	995	1,960	1,323	2,550	1,008	1,483	1,434	1,862	1,191	1,905
Calipee ...	4,226	374	4,120	535	4,186	489	5,743	871	4,788	631
Bêche-de-mer ...	6,061	459	9,647	603	7,673	395	—	—	—	—
Turtle strips ...	1,314	93	2,567	152	2,511	179	1,183	153	1,580	235

Plans for the development of an export of fish have been put forward by a local business man, but are for the time being in abeyance.

6. OTHER PRODUCTS.

55,240 kilos of liquid birds' egg yolk, valued at £913, were exported in 1932 and 57,400 kilos, valued at £670, in 1933. The manufacture of this from the eggs of the sooty tern, found on the outlying islands is a new industry.

B.

FOOD SUPPLY.

Apart from the meat, pig-meat, and fish mentioned above, coffee of the *Robusta* variety is grown on 20 acres and sugar-cane on about 9 acres for local consumption, and there is scattered cultivation on a small scale of cassava, sweet potatoes, bananas, breadfruit, eddoes, yams, travolo, and arrowroot.

There is some cultivation of maize on the outlying islands, and this cultivation could be substantially increased.

Of imported food-stuffs, other than beverages, the most important are rice and flour, of which 2,225 tons, valued at £11,504, and 88 tons, valued at £834 respectively, were imported from India in 1933, but there was also importation, which was in the aggregate relatively substantial, of other food-stuffs of various kinds.

The Colony could not, ordinarily, dispense entirely with imported food-stuffs, as rice, which is imported, is one of the staple foods largely consumed.

VI.—Industry.

There is no industry of any significance in the Colony, apart from the conversion of primary products mentioned under Section V. A. above.

VII.—Other Economic Activities.

Nil.

VIII.—Communications.

There are over 150 miles of roads and bridle paths in the Colony. Of these at the end of 1933 only about 50 miles were suitable for motor transport and, owing to the financial situation, further road work to this end is temporarily in abeyance.

Road transport services, comprising a total of 26 commercial motor vehicles (18 passenger and 8 freight), owned by private individuals, operate on the main island only.

There are no railways, tramways, or canals in the Colony.

Communication with the outer world is maintained by the British India Steam Navigation Company whose steamers on the Bombay-Mombasa route call once every four weeks on the outward and once every eight weeks on the inward journey.

Steamers of the Royal Dutch Mail Line call at Mahé once every four weeks *en route* from Zanzibar and Mombasa to Penang and Batavia.

Steamers of the Scandinavian East African Line call approximately every six weeks on their way from Madagascar ports to Europe and other vessels (steam or sail) call at irregular intervals.

In 1933 11 sailing vessels, of an aggregate tonnage of 5,565 (9 British, 1 German and 1 Finnish) and 44 steam vessels of an aggregate tonnage of 174,373 (26 British, 9 Dutch, 6 Norwegian, 2 French, and 1 German) entered at Port Victoria.

Communications between Mahé and islands within a radius of 80 miles are maintained by a Government motor-launch on a bi-weekly service and by small sailing and auxiliary vessels at irregular intervals; between Mahé and other islands distant 80 to 650 miles, by sail and auxiliary motor vessels, privately owned, which visit every island at least once every three months; calls are made more frequently to transport labourers and the products to and from Mahé.

The only port in the Colony is Port Victoria, Mahé, at which is the principal harbour of the Seychelles Group. The harbour is enclosed and sheltered by islands and affords safe anchorages to vessels at all times of the year. The depth of water is ample and the holding ground good. The necessary lights are provided for shipping in the vicinity of Mahé and in the harbour, the latter being well marked and buoyed.

There are no piers or wharves for vessels to go alongside; the inner harbour can accommodate two vessels of 6,000 tons simultaneously beside the coasting craft. Vessels up to 600 feet in length can enter the inner harbour, but larger vessels have to stay outside.

IX.—Tariff.

Duties are levied on all imports, with the exception of certain goods specially exempted. Specific rates are charged on tobacco, alcoholic liquor, the principal dutiable food-stuffs and some other goods; and *ad valorem* rates on the rest. The *ad valorem* rates on all goods not otherwise provided for are 15 per cent. preferential and 25 per cent. general. In a few cases higher *ad valorem* rates are payable. Imperial Preference is provided for in most cases (other than staple food-stuffs and beverages) at not less than 10 per cent. *ad valorem*.

A surtax of 10 per cent. of all duties is at present in operation and there is also a graduated package tax (varying from Re.0.25 to Rs.20 per package).

X.—Trade Representatives.

The Colony has no trade representatives overseas nor are there overseas trade representatives in the Colony.

The Clerk to the Governor, however, acts as Imperial Trade Correspondent in the Colony.

MEDITERRANEAN DEPENDENCIES

CYPRUS.

I.—Situation, etc.

Cyprus, since 1925 a British Colony, is an island in the eastern Mediterranean, situated between latitudes 34° and 36° North and longitudes 32° and 35° East, 40 miles south of Asia Minor, 60 miles west of Syria, and 240 miles north of Egypt.

The climate is healthy, and dry except on the coast in summer. In the plains the temperature may reach 110° F. in summer, and the heat and glare are trying, but at Troödos, the summer seat of the Government, and at the other hill resorts (from 4,000 to 6,000 feet above sea level) the day temperature between June and September rarely exceeds 80° F. and the nights are pleasantly cool. Troödos is suitable as a health resort for sufferers from tuberculosis, and other pulmonary affections, malaria, and anaemia.

The winter in the plains is cool, dry, and bracing; snow and frost are of rare occurrence. The slight rainfall, averaging 20 inches annually, occurs between October and March. There have been occasional periods of serious drought such as in 1931-32. Slight earthquakes occur fairly frequently in winter but rarely do any damage to life or property. The mean temperature at Nicosia during 1933 was 66·3° F., the mean maximum 78° F., and the mean minimum 54·6° F. During that year rain fell on 49 days, clear sky was recorded on 161 days.

The total area is 3,572 square miles, or 2,286,080 acres, of which at the end of 1933 approximately 1,600,805 acres had been alienated, leaving a balance of 280,187 acres of rocky uncultivable land and cultivable land and 405,088 acres of forests.

The system of land tenure is a complicated survival from Turkish times. There are six classes of immovable property each with distinct laws of tenure and transmission, and the laws of inheritance are different for Moslems and non-Moslems.

The classes are:—

(i) *Arazi mirié* or State-owned agricultural land held by *qochan* (title-deed) from the Land Registry Office, alienable by sale and transmissible by inheritance within specified degrees of relationship, but not disposable by will, and escheating to the State as *mahlul* on failure of heirs or on being left uncultivated for certain periods without specified excuse;

(ii) *Arazi memluké*, land which has been built over or set apart as a site for a town or village, or land granted by patent from the State to be so held, alienable by sale, inheritance, or will of the owner;

(iii) *Mulk*, comprising buildings, trees, gardens, vineyards, wild grafted trees, similarly alienable;

(iv) *Arazi mevcoufé*, lands dedicated to some definite purpose such as the upkeep of Moslem religious institutions, and subdivided into various categories for purposes of transmission, usually inalienable by sale or inheritance;

(v) *Arazi metrouké*, land dedicated for public use *ab antiquo* and inalienable; and

(vi) *Arazi mevat* or *hali*, unowned waste land, which can be converted, with the consent of the Government, into *arazi mirié* by cultivation.

The bulk of the land is *arazi mirié*, cultivated by small-holders. The average size of a holding is 7½ acres and of a cultivated plot 2 acres. The annual charges on land and other immovable property are a tax of £2 per thousand of the assessed capital value plus an education tax in towns of double the land tax and in villages of three-quarters of the land tax.

II.—Population, etc.

Uncertainty about the original inhabitants of Cyprus makes it convenient to classify the present population by religions. Four-fifths are Orthodox Greek-Christians of the Autocephalous Church of Cyprus, and nearly one-fifth are Moslems, the descendants of Turkish settlers at the Ottoman conquest of 1570 and of subsequent immigrants, all, prior to the Annexation to Great Britain in 1914, Turkish subjects but now, subject to compliance with certain regulations, British subjects. There is also an increasing Armenian community.

According to the Census of 1931 the total population, including the military garrison, was 347,959 (an increase of 37,244 or 11·98 per cent. over the total in 1921), classified according to religions and birth-places as follows:—

Religion.					
Orthodox Greek-Christians	...	...	...	...	276,573
Moslems	...	...	...	...	64,238
Armenian Gregorians	...	...	...	...	3,377
Maronites	...	...	...	...	1,704
Latins	...	...	...	...	851
Anglicans	...	...	...	...	602
Other Protestants	...	...	...	...	455
Jews...	...	...	...	...	75
Others	...	...	...	...	84
Total	...	...	...	...	347,959

<i>Birthplace.</i>						
Cyprus	...	...	...	...	...	340,667
Europe	...	...	...	...	...	4,635
Asia	...	...	...	...	...	2,125
Africa	...	...	...	...	...	445
America	...	...	...	...	...	73
Australia	...	...	...	...	...	14
Total	...	...	...	...	...	347,959

The estimated population at the end of 1933 was 357,934.

The language in most general use is Modern Greek. Turkish is spoken by Moslems and Armenians, who are, however, largely bilingual, and English is spreading steadily.

The majority of the native-born population are engaged in agricultural pursuits. The only large organized industries are the pyrites and asbestos mines and there are no large factories. There were in 1931 27,565 male and 60,022 female persons without occupation. The principal occupations returned at the Census of 1931 were:—

Farmers, agricultural labourers, gardeners, and shepherds	...	68,277
Weavers	...	6,222
Domestic servants	...	5,212
Masons and mason labourers	...	4,002
Boot and shoemakers	...	3,608
Labourers in mines and quarries	...	3,197
Lace-makers	...	3,079
Dressmakers	...	2,891
Carpenters	...	2,235
Professors and teachers	...	1,938

During 1933 8,497 persons entered and 8,678 persons left Cyprus. They were not identified as immigrants or emigrants. During the preceding five years 37,677 persons entered and 38,266 persons left Cyprus, implying that there has been a loss by emigration of 589 persons, or 0.35 per cent. of the population, a negligible figure.

III.—Finance.

A.—CURRENCY AND BANKING.

The legal currency is the gold sovereign (rarely seen in circulation); silver pieces of 45 piastres (5s.), 18 piastres (2s.), 9 piastres (1s.), 4½ piastres (6d.), and 3 piastres (4d.); bronze coins of one, half, and quarter piastre; and local currency notes of £5, £1, and 10s. The total amount of coins and notes in circulation at 31st December, 1932, was estimated as follows:—

	£		£		£
English gold	... 12,000	Cyprus silver	... 127,500	Currency notes	... 396,166
Other gold	... 5,800	Cyprus bronze	... 13,675		

The Cyprus £1 is equal to the pound sterling. There is a small commission on exchange, the average rate on London being $\frac{1}{4}$ per cent.

There are in the principal towns branch offices or agencies of the Ottoman Bank, the Ionian Bank, the Bank of Athens, and the Bank of Cyprus (Head Office at Nicosia). The Agricultural Bank, established in 1925 under Government guarantee, is operated by the Ottoman Bank in connection with the Co-operative Credit Societies of which there were 326 in 1933. There are also the Bank of Larnaca, the Emniet Bank, the Banque Populaire de Limassol, the Famagusta Bank, the popular Bank of Paphos, and the Melissa Bank, all limited companies registered under the Companies (Limited Liability) Law, 1922, 14 Co-operative Societies, 5 Savings Banks established under the Companies Law, and two other Savings Banks. The Government Savings Bank ceased to exist in 1929.

The Government is not now engaged in any form of banking business except the making of advances, under the Public Loans Laws, 1897 and 1930, to persons, associations, village communities, or municipal bodies for objects tending to advance the agricultural, manufacturing, and social development of the Colony, and the occasional issue, as during the drought of 1932, of seed corn and fodder on loan to farmers.

B.—PUBLIC FINANCE.

1. *Public Debt.*—The total public debt at 31st December, 1933, was £615,000 (Inscribed Trustee 4 per cent. Stock) out of which the Irrigation Works, Harbour, and Railway Loans have been repaid. The annual amount required for interest is £24,600 and for management £123, and an annual contribution, beginning in February, 1935, of 1½ per cent. per annum (£9,225) is to be made to a sinking fund.

Since 1878, the date of the British occupation, Cyprus has paid an annual sum of £92,800 known formerly as the Turkish Tribute and now as the Cyprus share of the Turkish Debt Charge. This charge has never been regarded as properly forming part of the Public Debt and a grant-in-aid, at first fluctuating, has always been made from Imperial Funds in respect of it. The whole of the £92,800 is now paid by the Imperial Government subject to a contribution from the Colony of £10,000 towards Imperial Defence.

2—(a) *Revenue.*—The revenue (excluding the grant-in-aid and grant from the Colonial Development Fund) for 1933 was £747,559. The estimated revenue, similarly arrived at, for 1934 is £718,660.

The Railway, Irrigation, and, to some extent, the Forest Departments may be regarded as self-balancing. The Post Office is probably largely so, but its revenue from the sale of postage stamps cannot be separated from the total receipts from the sale of stamps which include payments in respect of customs dues and other fiscal purposes.

*Analysis of Revenue on the basis of the 1934 Estimates.
Self-Balancing Departments.*

	Revenue.	Expenditure.	Net Surplus or Deficit.
	£	£	£
Railway	21,100	20,642	+ 458
Irrigation	800	1,591	— 1,091
Forest	10,550	27,679	— 17,129
	<u>£32,450</u>	<u>£50,212</u>	Net deficit £17,762

General Revenue.

	£	Per cent- age of whole.
1. Customs	335,000	48·8
2. Licences, Excise and Internal Revenue not otherwise classified	278,000	40·5
3. Fees of Court or Office, Payments for Specific Services and Reimburse- in-Aid	25,230	3·8
4. Interest on Government Moneys	29,300	4·2
5. Other Receipts	18,680	2·7
	<u>686,210</u>	100
Revenue of self-balancing Departments set-off against Expenditure	32,450	
	<u>£718,660</u>	

2.—(b) Analysis of Import Duties for 1933.

Amount of duty collected on articles imported from:—

Class.	United Kingdom.	Other Empire.	Foreign Countries.	Total.
	£	£	£	£
I	41,507	8,160	83,111	132,778
II	1,253	38	13,031	14,322
III	38,304	3,437	120,465	162,206
IV	—	—	—	—
V	114	—	—	114
Total	<u>£81,178</u>	<u>£11,635</u>	<u>£216,607</u>	<u>£309,420</u>

Note.—These figures are approximate only.

3. *Expenditure.*—The expenditure (excluding the Cyprus share of the Turkish Debt Charge and the expenditure from grants from the Colonial Development Fund) was in 1933 £696,923. There was in 1933 expenditure from the grant from the Colonial Development Fund of £14,170. The estimated expenditure for 1934 (excluding the Cyprus share of the Turkish Debt Charge and expenditure from the grant from the Colonial Development Fund) is £703,365.

The following are the principal heads of expenditure:—

	Expenditure.	Estimated Expenditure, 1934.	Percentage of whole.
		£	
1. Public Debt		24,723	3·5
2. Administration		257,570	38·4
3. Economic Development		115,056	17·2
4. Social Services		195,003	29·1
5. Non-effective (Pensions)		50,801	7·6
6. Defence		10,000	1·5
7. Loss on self-balancing Departments		17,762	2·7
		<u>670,915</u>	100
Expenditure of self-balancing Departments set-off against Revenue		32,450	
		<u>£703,365</u>	

4. Cyprus has a reserve fund of £90,000, mostly invested in other Governments' Funds, which has remained intact for many years. It is intended for use in a general emergency such as the complete failure of the crops and there are no existing liabilities against it.

There are no other important assets of Government except loans to Co-operative Credit Societies amounting in 1933 to £41,552 and the usual invested reserves in respect of the note and silver issues (£559,909 in 1933).

5. The Grant-in-Aid of £92,800 is the amount of the Cyprus share of the Turkish Debt Charge (see paragraph 12 above) and is not therefore strictly a grant-in-aid of the Colony's revenue which is normally sufficient to meet ordinary expenditure. No grant-in-aid has been requested for the future.

Grants from the Colonial Development Fund have been made, or are anticipated, as follows:—

	£	
1931 ...	41,600	} For reconstruction of roads and purchase of agricultural machinery.
1932 ...	38,061	
1933 ...	14,186	
1934 ...	7,800	

The following are the amounts of Empire Marketing Fund Grants for the encouragement of the flax industry:—

	£
1932 ...	317
1933 ...	99

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total (excluding value of Ships' Stores).
	£	£	£	£
1913 ...	120,713	6,249	571,409	698,371
1930 ...	234,838	56,028	925,667	1,216,533
1931 ...	224,692	95,782	780,316	1,100,790
1932 ...	277,650	95,583	570,715	943,948
1933 ...	227,636	89,332	576,830	893,798

The value of exports for Ships' Stores for the years in question was as follows:—

	£		£
1913 ...	1,542	1932 ...	2,184
1930 ...	1,788	1933 ...	5,183
1931 ...	2,072		

(ii) *Domestic Exports by Classes, 1933.*

To:—	Class I.	Class II.	Class III.	Class IV.	Class V.	Total Merchandise.
	£	£	£	£	£	£
United Kingdom ...	155,625	59,986	6,514	—	384	222,509
Palestine ...	51,896	1,337	1,677	18,090	—	73,000
Rest of Empire ...	9,273	258	900	—	—	10,431
<i>Total Empire</i> ...	<i>216,794</i>	<i>61,581</i>	<i>9,091</i>	<i>18,090</i>	<i>384</i>	<i>305,940</i>
Italy ...	38,092	85,343	1,912	—	—	125,347
Egypt ...	91,233	1,225	7,959	11,141	—	111,558
Germany ...	13,091	75,820	222	—	—	89,133
Holland ...	9,533	32,560	22	—	—	42,115
Greece ...	16,329	12,793	1,565	1,064	—	31,751
France ...	13,251	13,943	3,895	—	—	31,089
Other foreign countries...	25,434	38,336	4,025	6,248	—	74,043
<i>Total foreign countries</i> ...	<i>206,963</i>	<i>260,020</i>	<i>19,600</i>	<i>18,453</i>	<i>—</i>	<i>505,036</i>
Ships' Stores ...	2,151	92	1,732	—	—	3,975
GRAND TOTAL ...	£425,908	£321,693	£30,423	£36,543	£384	£814,951

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>			<i>Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of Destination with Amounts in £'000.</i>
<i>Class I.</i>				£	
Carobs (whole, ground and seed).		34,069 tons	122,288		United Kingdom (92), Egypt (8), Holland (8), Germany (7).
Fruit.					
Raisins	99,374 cwt.	58,999		Italy (35), France (11), Egypt (4), Germany (2), Roumania (2).	
Oranges	20,226,424	34,498		Egypt (13), United Kingdom (11), Germany (4), Greece (2).	
Almonds, in the shell and shelled.	3,578 cwt.	10,610		United Kingdom (9), Egypt (1).	
Other		16,828		Egypt (8), Palestine (3).	
			120,935		
Vegetables—					
Potatoes	226,236 cwt.	46,607		Palestine (21), Greece (13), Egypt (10).	
Other	34,042 „	4,084		United Kingdom (3).	
			50,691		
Wines (all kinds)	1,136,236 gal.	49,373		Egypt (23), United Kingdom (19).	
Animals and Birds, living, for food.	3,920	27,144		Palestine (24).	
Tobacco and cigarettes	372,210 lb.	13,398		United Kingdom (13).	
Cumin Seed	5,877 cwt.	8,341		Egypt (4), British East Indies (2).	

(iii) *Principal Domestic Exports, 1933.*—continued.

					Principal Countries of Destination with amounts in £'000.
Class II.	Article.	Quantity.	Total Value.	£	
Pyrites Ore		209,970 tons	195,779		Italy (78), Germany (73), Holland (32), United Kingdom (9).
Asbestos		4,567 tons	44,088		United Kingdom (29), United States of America (9)
Wool		8,318 cwt.	16,581		United States of America (13), France (3).
Hides and Skins		3,815 cwt.	14,826		Italy (6), France (4), Germany (2).
Raw Cotton		4,378 cwt.	11,724		Greece (11).
Terra Umbra		4,168 tons	11,136		United Kingdom (5), United States of America (5).
Silk, raw and waste		290 cwt.	10,105		United Kingdom (9), France (1).
Class III.					
Embroidery and Needlework		—	16,453		United Kingdom (6), France (4), Italy (2).
Class IV.					
Mules		1,643	30,684		Palestine (14), Egypt (10), Syria (5).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	176,755	6,196	492,194	675,145
1930	394,829	189,161	838,539	1,422,529
1931	413,551	197,966	803,968	1,415,485
1932	386,730	167,030	793,835	1,347,595
1933	400,705	98,872	758,291	1,257,368

(ii) *Imports by Classes, 1933.*

From:—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom	65,585	21,291	313,226	5	400,107
Australia	53,648	190	371	—	54,209
British India	8,512	20	17,755	—	26,287
Canada	453	82	7,467	—	8,002
Rest of Empire	4,649	137	5,088	—	9,874
Total Empire	132,847	21,720	343,907	5	498,479
Italy	70,667	1,795	41,869	—	114,331
France... ..	59,131	435	22,856	—	82,422
Roumania	89	33,200	47,782	—	81,071
Germany	521	116	74,393	—	75,030
Greece... ..	34,934	3,758	27,000	—	65,692
Japan	997	—	63,631	—	64,628
Egypt	17,961	14,249	31,751	—	63,961
Belgium	950	118	24,103	—	25,171
Turkey	16,459	4,549	2,059	—	23,067
Other foreign countries	74,936	10,782	77,162	—	162,880
Total foreign countries	276,645	69,002	412,606	—	758,253
GRAND TOTAL	£409,492	£90,722	£756,513	£5	£1,256,732

In addition there were imports of bullion and specie to the value of £836: £598 from the United Kingdom, and £38 from foreign countries.

(iii) *Principal Imports, 1933.*

Article.	Quantity.	Total Value.	Principal Countries of Origin with Amounts in £'000.
Class I.		£	
Corn, Grain and Flour —			
Flour, Wheaten	550,944 cwt.	172,876	Italy (67), France (54), Australia (51).
Rice	29,349 „	11,652	India (7), Egypt (3).
Other kinds	47,161 „	9,939	Turkey (5).
	627,454 „	194,467	
Oils, Edible—			
Bean	18,329 „	25,518	United Kingdom (15), Denmark (10).
Coconut and similar vegetable oils.	9,501 „	12,541	France (4), Denmark (4), United Kingdom (3).
Other kinds	3,130 „	6,369	Greece (3), Syria (1), Holland (1).
	30,960 „	44,428	
Tobacco and Cigarettes, etc. ...		29,928	Greece (26), United Kingdom (2).
Sugar	2,803 tons	24,142	United Kingdom (20), Java (3).
Coffee, raw	7,265 cwt.	17,971	Brazil (17).
Beans and peas, roasted or otherwise.	49,841 „	17,837	Bulgaria (12), Turkey (3).

(iii) *Principal Imports, 1933.—continued.*

<i>Article.</i>		<i>Total Quantity.</i>	<i>Total Value.</i> £	<i>Principal Countries of Origin with Amounts in Rs. '000.</i>
<i>Class II.</i>				
Timber (all kinds) ...	...	587,907 cub. ft.	38,718	Roumania (28), Sweden (5), Turkey (4).
Asphalt and bitumen ...	...	36,759 cwt.	13,326	Egypt (10), United Kingdom (3).
Coal ...	...	8,962 tons	13,301	United Kingdom (11), Egypt (2).
<i>Class III.</i>				
<i>Cotton Manufactures—</i>				
Piece Goods ...	...	4,902,981 yd.	64,043	Japan (33), United Kingdom (22), Italy (7).
Yarns and Threads ...	...	...	31,327	United Kingdom (18), India (5), Italy (4).
Other (except apparel) ...	...	...	15,642	United Kingdom (4), Italy (3), Japan (3), Germany (2).
			111,012	
<i>Oils—</i>				
Petrol and Benzine ...	...	958,369 gal.	33,559	Roumania (33).
Kerosene ...	...	621,842 „	13,773	Roumania (13).
Lubricating and Mineral ...	...	6,154 cwt.	6,257	United Kingdom (4), Roumania (1).
			53,589	
<i>Machinery—</i>				
Oil Engines ...	...	...	14,919	United Kingdom (14).
Mining ...	...	...	8,355	United Kingdom (7).
Other ...	...	...	23,368	United Kingdom (14), Germany (4).
			46,642	
<i>Woollen Manufactures—</i>				
Piece Goods ...	...	198,460 yd.	33,384	United Kingdom (26), Italy (4).
Other (except apparel) ...	...	...	10,864	United Kingdom (6), Italy (2).
			44,248	
<i>Motor cars, etc. and parts—</i>				
Motor Cars, etc., complete ...	...	158	20,355	United Kingdom (19).
Motor car, etc., chassis ...	...	81	11,419	United Kingdom (9), Canada (2).
Parts ...	...	...	7,036	United Kingdom (3), United States of America (2).
			38,810	
<i>Leather and Leather Manufactures—</i>				
Leather, sole ...	...	4,645 cwt.	18,713	Egypt (16).
Leather, dressed ...	...	...	13,326	Egypt (4), Canada (2), Hungary (2).
Manufactures ...	...	...	1,844	
			33,883	
			32,575	United Kingdom (9), Germany (5), Italy (6), Japan (6).
<i>Paper Manufactures—</i>				
Stationery, all kinds ...	...	...	10,734	United Kingdom (4), Germany (3).
Other ...	...	...	16,163	Germany (4), Czecho-Slovakia (2), Austria (2), United Kingdom (2).
			26,897	
<i>Silk Manufactures (including arti- ficial silk)—</i>				
Piece Goods ...	...	696,518 yd.	19,232	Japan (14), France (2).
Other (except apparel) ...	...	...	5,843	Italy (2), United Kingdom (2).
			25,075	
<i>Hardware and Cutlery ...</i>				
Chemical Manure ...	...	67,913 cwt.	23,356	Germany (9), United Kingdom (5), Austria (2).
Medicines and Medical and Surgical Appliances.	...	...	22,901	United Kingdom (14), Greece (6), Holland (2).
			20,017	United Kingdom (8), Germany (5), France (4).

V.—Natural Resources.

A.

1. AGRICULTURE.

The most important natural resources of the Colony are agricultural. Of 134,279 persons of both sexes shown in the Census of 1931 as practising occupations, about 50 per cent. are directly engaged in agriculture, and this industry supports a substantial number of merchants.

Cereals cover the greatest area of any one type of cultivation. Of the total area under cereal cultivation approximately 55 per cent. is wheat, 40 per cent. barley, and the remainder oats.

The production of wheat, barley, and oats for the last five years is as follows:—

Year.	Wheat.		Barley.		Oats.	
	Area acres.	Yield bushels.	Area acres.	Yield bushels.	Area acres.	Yield bushels.
1929 ...	194,467	2,195,173	125,471	2,820,763	12,400	241,229
1930 ...	184,111	1,873,259	122,609	2,378,359	11,471	201,013
1931 ...	183,304	1,623,122	92,743	1,331,424	13,016	214,879
1932 ...	170,206	1,144,243	93,684	1,041,556	11,386	122,224
1933 ...	177,305	1,585,385	106,286	1,583,621	10,718	168,867

Cereal production is steadily maintained but during recent years barley production has tended to decrease. Formerly there was a good demand for Cyprus barley for export for malting purposes but that trade has now declined.

Barley and wheat are not imported to any appreciable extent except in years of abnormal drought.

Carobs are the most important agricultural product exported, the greater part going to the United Kingdom. Total exports (including crushed carobs and seeds) in recent years have been:—

Year.	Quantity. Tons.	Value. £
1929 ...	28,779	171,264
1930 ...	41,860	119,856
1931 ...	70,037	144,858
1932 ...	62,538	183,122
1933 ...	34,069	122,288

Carobs are used in the manufacture of cattle food and, to a lesser extent, in the textile industry. The demands in Great Britain accounted for over 85 per cent. of the total export of the whole carobs. The proportion annually supplied by the Colony to the United Kingdom is fairly constant.

Cultivation is in the hands of small-holders who sell to the exporters. The bulk is shipped overseas untreated, but there are three local crushing mills which, in 1933, handled an export trade of 841 tons of seeds and 6,721 tons of ground carobs. A small quantity is used in the Colony for making carob syrup and to a certain extent as cattle food.

Potatoes which, in recent years, assumed the second place in agricultural products exported, dropped to fourth place in 1933. This drop occurred in the exports to Egypt and Greece. The principal decrease in exports was to Greece where trade was hindered by exchange restrictions.

There is a heavy local consumption, and also an export trade of substance:—

Year.	Quantity. Cwt.	Value. £
1929 ...	338,980	132,924
1930 ...	344,075	95,352
1931 ...	260,788	93,648
1932 ...	308,455	85,800
1933 ...	226,236	46,607

The fall in value well illustrates the course of world depression in primary produce. Experiments are in progress to determine if new potatoes can be placed on the United Kingdom market in competition with those from foreign countries. At present the principal destinations are Palestine, Greece, and Egypt. It is not practicable, owing to economic and cultural difficulties, to ship main crop potatoes to the United Kingdom in a year of normal production in that country.

Wines have been made in the Colony since the Middle Ages. Characteristically they are heavy and rather rough, but since 1927 attention has been given to the preparation of lighter wine suitable for export to Great Britain and, while the quality does not yet warrant its appearance as Cyprus wine, increasing quantities are being shipped to this market where they are used for blending. New varieties of vine are being planted and experiments in manufacture are in constant progress. Export to the United Kingdom is in the hands of one concern, a subsidiary of two prominent London firms of wine shippers and distillers, working in close association with local establishments of which there is only one operating on an extensive scale. No wine is permitted to be shipped to the United Kingdom unless it reaches a prescribed standard.

Exports of wines other than Commanderia to all destinations were in recent years as follows:—

Year.	Quantity. Gal.	Value. £
1929 ...	1,503,355	61,332
1930 ...	1,362,501	50,591
1931 ...	2,009,710	75,499
1932 ...	1,460,966	70,713
1933 ...	1,127,786	48,577

Exports to the United Kingdom were:—

Year.	Quantity. Gal.	Value. £
1929 ...	41,624	3,165
1930 ...	81,468	5,542
1931 ...	156,662	12,339
1932 ...	178,428	14,243
1933 ...	229,526	18,866

Commanderia is a heavy sweet dessert wine. Exports have not exceeded 10,600 gallons in recent years, nor is any great extension expected in the future.

Citrus Fruits.—Considerable interest is being taken in the production of citrus fruits for export. The various restrictions imposed on the import of citrus fruits by neighbouring countries and the improvement in the quality of Cyprus produce has had the effect of diverting, during the last few years, the export trade to more distant markets and especially to the United Kingdom and North Western Europe.

It is estimated there are 5,500 donums under citrus cultivation in bearing, over 75 per cent. of that area being planted with orange trees, about 20 per cent. with lemon trees and the remainder with mandarines, bitter oranges and grapefruit. Grapefruit production has only recently been taken up by citrus growers. New areas are rapidly being planted with citrus and there is a heavy demand for orange and grapefruit planting material.

The export of oranges during the last five crop years and the countries of destination are as follows:—

<i>Country of Destination.</i>	1929-30. <i>No.</i>	1930-31. <i>No.</i>	1931-32. <i>No.</i>	1932-33. <i>No.</i>	1933-34. <i>No.</i>
United Kingdom ...	111,560	203,764	1,347,058	4,182,153	14,329,035
Germany ...	1,500	48,094	8,000	1,384,275	3,634,730
Yugo-Slavia ...	—	234,626	—	18,000	3,097,204
Egypt ...	8,352,830	5,170,862	8,780,199	6,931,896	1,850,480
Austria ...	10,080	319,800	—	179,300	1,123,000
Sweden ...	—	—	—	27,000	1,082,715
Greece ...	8,223,925	14,173,674	7,557,720	1,166,357	1,024,998
Other countries ...	196,468	304,904	24,513	960,923	3,224,103
Total ...	16,896,363	21,455,724	17,717,490	14,849,904	29,366,266

Several direct shipments were made to the United Kingdom and Northern Europe last season and negotiations continue with a view to improving and extending regular and direct shipping facilities.

The export of citrus fruits is controlled by Regulations enacted under the Agricultural Produce (Export) Law, 1933.

Other Fruits.—There is an extensive production and local consumption of fruit, the most important for export purposes other than citrus fruits being raisins for distilling and almonds. Pomegranates were exported to the annual value of £25,000 in 1928, but in 1933 this trade had shrunk to £5,318 owing to high duties in Egypt, the chief importing country. Raisins are a dwindling trade owing to the general depression.

Among other fruits apricots and kaishas (the white apricot of Cyprus), cherries, grapes, hazelnuts, peaches, plums, pears, quinces, melons, and figs are exported, mostly in small quantities and, especially those which are perishable, to neighbouring countries. The hill districts are eminently suitable for the production of deciduous fruits and the Department of Agriculture has made special efforts to improve local varieties and to introduce new ones.

The Agricultural Produce (Export) Law, 1933, has been enacted to provide for the inspection and grading of produce intended for export to any country to which the Law may have been applied.

Tobacco.—Cyprus is eminently suited for tobacco growing. Two kinds are cultivated, "Latakia" or dark fumigated leaf for pipe mixtures, and Oriental or yellow leaf for cigarettes; practically all of it goes to the United Kingdom. In 1933 there was a renewed interest in demand for Cyprus tobacco and the area cultivated increased from 1,317 donums to 2,894 donums. Considerable progress has been made in improving the quality of the cigarette leaf. With the growth of the manufacture of Cyprus cigarettes in London exports may be expected to increase, but there is no widespread demand for cigarettes of this distinctive flavour, and the task of increasing it is at present beyond the competence of the firms concerned. There is, however, a plan under discussion for creating distributive agencies throughout the United Kingdom and its success would mean almost immediate prosperity to the growers. Experiments in the growing of leaf of the Virginian type are in progress.

The cultivation, manufacture, and sale of tobacco are governed by the Tobacco Law, 1932, operative as from the 1st of August, 1932.

Other Products.—Other agricultural products of note are onions, raw cotton, raw silk and silk waste, cumin, and sumach. Exports for 1933 were:—

<i>Article.</i>	<i>Quantity.</i> <i>Cwt.</i>	<i>Value.</i> <i>£</i>	<i>Principal Country of Destination.</i>
Onions ...	33,988	4,069	United Kingdom.
Raw Cotton ...	4,378	11,724	Greece, United Kingdom.
Raw Silk and Silk Waste ...	290	10,105	France, United Kingdom.
Cumin ...	5,877	8,341	Egypt, France.
Sumach ...	12,005	7,412	United Kingdom.

Olives and olive oil are two of the staple foods of the native population, but production rarely exceeds requirements. Eggs and vegetables and fruit other than those enumerated above are produced in sufficient quantities for local needs.

2. FORESTRY.

Although the Forest Department has been described as quasi "self-balancing" the State forests of Cyprus are important as natural resources less for their exploitable timber content than for their influence upon climate and soil conservation. They cover an area of 405,088 acres, situated mainly on the northern and southern mountain ranges, of which 118,080 acres are bare, burnt, cut-over, or non-productive areas and 75,123 acres are mixed timber and scrub forests. Aleppo and Troödos pine, cypress, oak, plane, alder, and cedar are the principal forest trees. The stock was estimated in 1933 to be 114,000,000 cubic feet, valued at over £633,000 at 1½ pence per cubic foot.

Except for permits to cut timber, to extract charcoal and wild olive trees and to gather fuel, granted to villagers for small quantities, the whole of the exploitation of forest products is confined to the Forest Department. The sale of building material, cartwood, chairwood, ploughwood, fuel, forest seeds, plants and minor forest produce, realized £11,223 in 1933. Every effort is being made to put all wood, including waste off-cuts, ordinarily sold as fuel, to the best use. Over 800 kinds of wooden articles have been made for sale in the island or as telling advertisements of the main product of the forests, viz., wood. Some of these articles also have been exported.

The activities of the Department are chiefly directed to the scientific management and improvement of the existing forests and reafforestation. Whilst building up a more normal and fuller growing stock of timber trees, every effort is being made to utilize as much fuel and timber as can be legitimately cut each year, on a sustained yield basis, as stipulated in forest working plans. Sufficient fuel is available for the needs of the Colony, but the bulk of the timber used is imported. In 1933 353,206 cubic feet of timber and 537,832 cubic feet of fuel were extracted from the State forests.

3. ANIMAL HUSBANDRY.

Stockbreeding is an industry of considerable economic importance. The official returns in 1932 were:—

Horses ...	...	4,612	Sheep ...	...	304,437*
Donkeys ...	...	53,738	Goats ...	...	224,030*
Mules ...	...	10,273	Camels ...	...	1,298
Oxen ...	...	43,604	Pigs ...	...	26,896†

The estimated value was £1,500,000. Natural pasture is poor in the summer months, and live-stock suffered severely in the drought of 1932. A Government Stock Farm is maintained at Athalassa and supplies breeding stock to district stud stables.

Oxen, donkeys, and mules (jennets) are important items in the Colony's export trade. The figures are:—

	Oxen.		Donkeys.		Mules.		All classes.
	Number.	Value. £	Number	Value. £	Number.	Value. £	Value. £
1929 ...	2,082	23,302	452	2,325	1,386	36,990	70,451
1930 ...	2,667	28,806	516	2,655	1,829	40,521	81,258
1931 ...	5,842	60,166	477	2,035	1,062	20,687	88,801
1932 ...	4,467	43,592	736	2,359	1,599	35,529	83,403
1933 ...	2,675	26,743	1,394	4,491	1,643	30,684	63,687

Oxen and donkeys are sent chiefly to Palestine and Egypt. Egypt, Palestine, and Syria are the principal purchasers of mules.

The yield of animal produce for 1933 was estimated as follows:—

	Quantity. Value at Farm.			Quantity. Value at Farm.			Quantity. Value at Farm.	
	Cwt.	£		Cwt.	£		Cwt.	£
Wool ...	8,649	34,599	Butter ...	345	2,303	Cheese ...	13,650	39,435

Exports of wool, cheese, and hides and skins were:—

ARTICLE AND PRINCIPAL COUNTRY OF DESTINATION.	WOOL (FRANCE AND UNITED STATES OF AMERICA).		CHEESE (EGYPT).		HIDES AND SKINS (FRANCE AND ITALY).	
	Quantity. Cwt.	Value. £	Quantity. Cwt.	Value. £	Quantity. Cwt.	Value. £
	...	...	...	...	...	...
1929 ...	5,715	27,773	5,183	21,672	3,116	31,412
1930 ...	1,936	5,365	4,812	20,751	2,065	12,805
1931 ...	3,306	7,152	4,123	13,689	2,263	12,658
1932 ...	3,816	6,616	3,588	15,902	1,963	8,919
1933 ...	8,318	16,581	4,507	15,586	3,815	14,826

4. MINERALS.

Cyprus is rich in minerals. Extensive deposits of cupriferous pyrites occur at Skouriotissa and Mavrovouni on the north-west coast and are mined by the Cyprus Mines Corporation, which in 1933 employed 1,564 persons per day and expended on wages an average of £7,612 a month in Cyprus. There is no local consumption, and the ore is exported to Italy, Germany, Holland, and the United Kingdom. Figures for the past five years follow:—

Year.	Quantity. Tons.	Value. £	Year.	Quantity. Tons.	Value. £
1929 ...	291,100	279,483	1932 ...	177,630	166,552
1930 ...	238,488	248,441	1933 ...	209,970	195,779
1931 ...	199,786	194,750			

The construction of a new Ore Treatment Plant was begun during 1933, and is proceeding satisfactorily.

Another company operates a small pyrites mine at Lymni by heap-leaching.

* Excluding those under one year old.

† Excluding those under three months old.

The **Asbestos** deposits of Amiandos-on-Troödos are understood to be practically inexhaustible. The serpentine rock is quarried by the Cyprus & General Asbestos Company and after treatment in primary and fibre mills is exported to the United Kingdom and to the Continent. During 1933 the Company employed on an average 728 persons per day, but during the summer months, when climatic conditions allow full work in the quarries, this figure rose to 1,400 persons a day. The average monthly wage bill to Cypriot employees was £2,122.

The increase in the Company's activities was made possible by a reduction of the Government royalty on asbestos exported, which enabled the Company to obtain a foothold in the markets of the United States of America.

<i>Exports:—</i>			<i>Exports:—</i>		
<i>Year.</i>	<i>Quantity. Tons.</i>	<i>Value. £</i>	<i>Year.</i>	<i>Quantity. Tons.</i>	<i>Value. £</i>
1929 ...	13,796	292,971	1932 ...	1,600	27,214
1930 ...	5,400	116,092	1933 ...	4,567	44,088
1931 ...	3,571	66,381			

Chrome Iron-ore is produced by the Cyprus Chrome Company on Troödos, where systematic prospecting operations have revealed a fairly large quantity of first and second grade ore. There were no exports in 1933, owing to the low price of and small demand for this metal.

Gypsum is of wide occurrence and is extensively quarried for local use and also for export, both in the raw and calcined state. It is estimated that during 1933 there were some 32 kilns at work employing about 220 men, in addition to numerous small kilns of which no particulars could be ascertained. For 1933 the output is estimated at 16,000 tons, whilst exports were as follows:—

	<i>Quantity. Tons.</i>	<i>Value. £</i>	<i>Principal Countries of Destination.</i>
Raw gypsum	2,034	436	Syria, Palestine.
Calcined gypsum	10,644	6,614	Egypt, Syria.

Neighbouring markets are likely to continue to be the most profitable.

Terra umbra of excellent quality is quarried in a primitive and inefficient manner by individuals under contract with the small factories, of which there were three in 1932. There is practically no local consumption, and exports, of which particulars follow, are now chiefly to the United Kingdom and the United States of America.

<i>Year.</i>	<i>Quantity. Tons.</i>	<i>Value. £</i>	<i>Year.</i>	<i>Quantity. Tons.</i>	<i>Value. £</i>
1929 ...	6,587	15,601	1932 ...	2,477	6,212
1930 ...	4,405	10,606	1933 ...	4,167	11,136
1931 ...	3,097	7,182			

There is also a very small production of *terre verte*.

Salt of high quality, sufficient for the Colony's needs, is collected from one of the two salt lakes. The lake is capable of supplying 31,000 tons of salt per annum, but only about one-tenth of the quantity is collected. The sale of salt is a Government monopoly, and realizes £25,000 a year.

All mineral deposits except those occurring on Mulk land (freehold land) are vested in the State and are operated under Mining Leases or Licences issued through the Mines and Labour division of the Land Registration and Survey Department.

At the end of 1933 there were in force seven mining leases (two held by the Cyprus Mines Corporation, two by the Cyprus & General Asbestos Company, one by the Cyprus Sulphur and Copper Company at Limni, one by the Troödos Chrome & Asbestos Company and one by the Hellenic Company of Chemical Products and Manures at Troödos), also three Mining Licences (held by the Cyprus Mines Corporation for ancient slags erection of factories and silica). In addition there were in force 20 Permits to prospect for minerals.

5. FISHERIES.

There is no freshwater fishing in Cyprus. The few rivers dry up in the summer before they reach the sea.

Round the coast red and grey mullet, bass, bream, eels, skate, cuttlefish, tunny, and goby are fairly plentiful, but the value of the sea fisheries is insufficiently appreciated and there is no organized fishing industry. According to the Census of 1931 there were only 313 fishermen in the Colony. The demand is much greater than the supply, which could be increased without difficulty. The total weight of fish landed in 1931 was 3,246 cwt., valued at £10,424. There is no export of fish, fresh, dried, or canned.

The coastal *sponge* beds have deteriorated owing to indiscriminate fishing. The sponges are of good quality, and are extracted by divers, licensed by the Government, from the Greek Islands. In 1933 21 cwt. valued at £1,476 were exported, mostly to Dodekanesia, where they are treated and placed upon the market.

B.

FOOD SUPPLY.

Cyprus is not self-supporting in respect of all essential food-stuffs. The staple foods of the indigenous population are bread, cheese, olives and olive oil, dried fish, eggs, meat, rice, vegetables, fruit, and salt; and of these cheese, eggs, meat, vegetables, fruit, and salt are or could be produced in sufficient quantities without difficulty.

Dried fish and rice, though largely consumed, may be regarded as not essential in the diet of the people, and it is probable, having regard to the fact that olives and olive oil are both imported and exported in normal years, that the cessation of external supplies of these commodities could be viewed with equanimity. Flour, however, must be imported in present conditions for, although Cyprus is a cereal-growing country exporting wheat and on occasion flour, the local production is insufficient to meet local requirements. Moreover the local flour is not popular with the bakers nor the bread made wholly therefrom with the consumers. The bakers consider that imported flour is more uniform in quality and less liable to deterioration in storage than the native, and that the loaves baked with it or with an admixture of native flour are more attractive, more palatable and larger from the same quantity of flour. It is unquestionable that the white loaf, formerly confined to urban districts, is increasingly used in the villages.

Imports of flour have steadily risen and the quantity now imported is in the neighbourhood of 50 per cent. of the Island's consumption. The low price of imported flour has forced down the local price of wheat and consequently it has been found necessary to increase the import duty on imported flour to £3 per ton, in order to protect the local cereal grower.

Cyprus could increase its wheat production by raising the average yield per acre, but owing to climatic and soil conditions and the small size of the average holding wheat can never be grown profitably at a price that will compete with the big wheat producing countries.

It appears to be desirable on the one hand to grow a different type of wheat that will compete in point of quality with imported flour and on the other hand to change over on low producing and marginal wheat lands to some form of production. Trials are being carried out by the Agricultural Department with a view to finding wheats of improved quality and high production suitable to local conditions and propaganda is being carried on to encourage the growth of forage for live-stock. There are good markets for slaughter cattle in Palestine and for mules in other nearby countries and production for these markets can be extended and developed considerably and will prove to be more profitable than wheat growing.

The Colony is an agricultural and not a lumber or manufacturing country and its annually recurrent requirements of the raw materials of industry and of manufactured goods must be supplied from abroad. Among the principal imports in Classes II and III listed above none can be supplied from local resources with the possible exception of leather.

VI.—Industry.

Except the mines, to which reference has already been made, there are no large industrial establishments. There are, however, many small undertakings, which, though the largest employs under 200 persons when in full operation, have a considerable aggregate output. Particulars of the most important of these follow in respect of the year 1933:—

<i>Industry and Number of Establishments.</i>	<i>Total Labour Force.</i>	<i>Approximate Value of Annual Production. £</i>	<i>Whether Production is chiefly for Local Consumption or Export.</i>
43 Brick and tile factories ...	382	15,702	Local.
3 Carob-crushers ...	41	Not ascertained.	Export.
12 Cheese factories* ...	84	13,158	Local and Export.
1 Citrus juice and oil extractor...	12	1,125	Export.
62 Cotton ginneries ...	97	9,191	Local.
32 Gypsum factories ...	213	5,811	Local and Export.
2 Macaroni factories ...	11	5,750	Local.
14 Mineral water factories ...	48	3,738	do.
1 Silk filature ...	185	4,852	Export.
12 Soap factories ...	61	19,592	Local.
1 Spinning factory ...	80	5,460	do.
1 Sumach factory ...	13	4,650	Export.
3 Tanneries ...	90	8,500	Local.
6 Tobacco factories ...	330	182,648	do.
21 Wine and spirit factories* ...	149	73,547	Local and Export.

In addition there is a considerable amount of domestic manufacturing production, including shoe-making, furniture making, principally for local use, weaving and the production of linen, lace, and embroidery work, of which there were exports, valued at £16,453 in 1933.

VII.—Other Economic Activities.

1. In ancient times Cyprus, on the main caravan route to India and the East, derived great profit from the warehousing of goods in transit, but the opening of more direct routes and the greater range and pace of modern transport have reduced it to a negligible amount. The annual value of goods entered for transshipment during the six years ended with 1933 did not exceed £4,600.

2. Cyprus is becoming increasingly popular with tourists. Part of the functions of the Trade Development Board in the Colony and of the Trade Commissioner in London is to encourage this traffic, the annual value of which is estimated as follows:—

1930 ...	£95,000.	1932 ...	£90,000
1931 ...	£90,000.	1933 ...	£130,000

The number of inward passengers including tourists for the day amounted to 8,936 during 1932 and to 16,027 during 1933.

Thirty-one clean and comfortable hotels exist in the principal towns and summer resorts of the island.

* Excluding some small undertakings.

VIII.—Communications.

1. At the end of 1933 there were 878 miles of Government roads with a minimum width of 16 feet, of which 240 miles had been reconstructed with an asphalt running surface 9 feet wide, suitable for motor traffic; and 2,195 miles of village roads many of which are motorable in summer. There are adequate private motor-car passenger and goods services, some of them under contract with the Post Office for the delivery of mails, between the principal towns and villages. A Government motor road service between Nicosia, Karavostassi, and Morphou has replaced scheduled railway services from Nicosia to Kalokhorio.

2. The Government Railway from Famagusta to Kalokhorio is a single track narrow-gauge system of 71 miles. Short branches operated by the Cyprus Mines Corporation connect it with the pyrites mines, and there is another narrow-gauge line between the mine and Xero, the pyrites port on Morphou Bay. The main line is now operated only to Nicosia (37 miles), and, while the line remains *in situ* from Nicosia to Kalokhorio, schedule train services have been replaced by road motor services.

3. There is no inland water transport nor facilities for it.

4. A regular weekly mail, passenger, and cargo service between Cyprus and Egypt is maintained by the Khedivial Mail Steamship and Graving Dock Company under Government subsidy. There are also regular weekly or fortnightly passenger and cargo services between Cyprus and neighbouring countries by the Lloyd Triestino Steamship Company, the Messageries Maritimes and other companies, between Cyprus and the United Kingdom indirectly at fortnightly or longer intervals by cargo ships of the Prince, Moss, and Ellerman Lines, and occasional calls by ships of the American Export Line from New York with passengers and cargo.

The lack of regular and direct cargo services hampers the export trade, particularly in perishable commodities, from Cyprus to the United Kingdom.

In 1933, 657 sailing vessels (130 British (Cypriot) and 527 foreign) of a total net tonnage of 28,295 and 648 steamships (206 British and 442 foreign) of a total net tonnage of 1,417,632 entered the various ports.

There is only one harbour, at Famagusta, capable of accommodating ocean-going vessels of any size. It has recently been enlarged and was handed over for trade purposes in September, 1933. It is now capable of receiving ships of 8,000 tons. The entrance is 250 feet wide. The harbour itself is 700 feet wide and 1,800 feet long, and has a quay wall 1,750 feet long. It has a depth of 24 feet at low water. There is no rise or fall of tide over two feet at any point of the coast.

At Larnaca and Limassol there are open roadsteads and jetties for coastal craft. At Kyrenia and Paphos there are small harbours capable of sheltering small vessels having a draught of not more than seven feet.

Regular air services have not yet been established. At Nicosia, Larnaca and Famagusta there are landing grounds and seaplanes can be accommodated in Famagusta Harbour. Recently five of the England-Australia air racers landed and fuelled at the Nicosia landing ground.

IX.—Tariff.

Approximately 40 per cent. of goods imported into the Island pay duty at specific rates, 40 per cent. at *ad valorem* rates carrying from 15 to 30 per cent., and 20 per cent. are admitted free of duty. Preferential rates of duty are accorded to all goods of Empire origin or manufacture. The margins of preference vary but generally amount to one-third or one-sixth of the full rate. On some goods the preference is higher, e.g., cinematograph films, dried fish, rice and spirits, half; flour two-thirds, and soap thirteen-twentieths of the full rate. There are no export duties.

X.—Trade Representatives.

There is a Cyprus Information Office in London for the purpose of distributing commercial information regarding Cyprus and of advising intending visitors to or settlers in the Colony.

The Secretary of the Trade Development Board is the Imperial Correspondent in Cyprus of the Board of Trade. In this capacity he deals with questions affecting the import trade of the Colony from Empire countries, and his other activities include the encouragement of the export trade and of the tourist traffic. The expenses of the Board are met from Government funds, but seven of the eleven members are private persons resident in the Colony.

GIBALTAR.

I.—Situation, etc.

Gibraltar consists of a long mountain block (the "Rock") rising to a height of 1,396 feet, 3 miles long, and $\frac{1}{4}$ mile broad, joined by a low sandy isthmus to the mainland of Spain, near the southern extremity of which, in latitude $36^{\circ} 7' 16''$ North and longitude $5^{\circ} 21' 13''$ West, it lies. The total area is only $1\frac{1}{2}$ square miles. The northern and eastern faces of the Rock are inaccessible cliffs and the town is built on the western and southern sides, facing the Bay.

The climate is mild and temperate, though somewhat hot and oppressive during the months of July and August. The meteorological record for 1933 shows 71.4° F. as the mean maximum temperature, the highest shade temperature being 96° F. on 9th August, and the lowest 38° F. on the 17th and 18th December. The rainy season is spread over the period from September to May; the annual average rainfall is 35 inches, but in 1933, 49.11 inches were registered, of which 14.96 inches fell in January.

II.—Population.

The estimated civil population at the end of 1933 was 16,397, including 15,071 permanent residents. In addition some 4,500 aliens and 1,500 British subjects come into the Colony daily from the neighbouring Spanish town of La Linea.

The total population shown in the 1931 census was 21,372. This figure included a Civil population of 17,613 and a floating Naval and Military population of 541 and 3,218 respectively. Of the Civil population, 1,216 were engaged in commerce and 820 in employments connected with transport and communications, while 908 were in Colonial Government and City Council employ.

III.—Finance.

A.—CURRENCY, BANKING, ETC.

The Gibraltar currency consists of a series of Government notes in the denominations of £5, £1, and 10s., based on sterling, with British subsidiary coinage. The local note circulation is at present £100,000. British currency notes are also legal tender and Spanish currency, although not legal tender, circulates freely.

Banks established in the Colony are:—

Barclays Bank (Dominion, Colonial, and Overseas).

Credit Foncier d'Algerie et de Tunisie.

A. L. Galliano.

Rugeroni Bros. and Company.

Thos. Mosley and Company.

B.—PUBLIC FINANCE.

1. There is no public debt.

2.—(a) *Analysis of Revenue (on the basis of Estimates for 1934).*

<i>Self-Balancing Department.</i>					<i>Revenue.</i>	<i>Expenditure.</i>
					£	£
Post Office	...	...	...	...	18,800	13,692
Net surplus £5,108.						
<i>General Revenue.</i>					£	Percentage.
1. Customs	...	...	...	...	83,000	52.4
2. Port, Harbour, and Wharf Dues	...	...	...	...	11,900	7.6
3. Licences, Excise, and other Revenue	...	...	...	...	9,600	6.0
4. Fees of Court, etc.	...	...	...	...	16,700	10.5
5. Rent of Government Property	...	...	...	...	16,000	10.0
6. Interest	...	...	...	...	16,200	10.3
7. Surplus on self-balancing Department	...	...	...	...	5,108	3.2
					158,508	100
Revenue of self-balancing Department set off						
against Expenditure					13,692	
Total					£172,200	

3. *Analysis of Expenditure (on the basis of Estimates for 1934).*

	£	Percentage.
1. Administration	82,300	52.5
2. Economic Development	13,324	8.5
3. Social Services	44,532	28.4
4. Non-effective, i.e., Pensions	16,722	10.6
	156,878	100
Expenditure of self-balancing Department		
set off against Revenue		
	13,692	
Total	£170,670	

4. *Reserve Funds, etc.*—The net excess of assets over liabilities at 31st December, 1933, exclusive of the Reserve Fund of £100,000, amounted to £204,035, but since that date a further transfer of £100,000 has been made to the Colony's Reserve Fund.

5. *Grants-in-Aid.*—The Colony has received no grants-in-aid or loans-in-aid of any kind.

IV.—Trade.

No statistics of imports and exports are kept, as Gibraltar is a free port except for duties on wines, spirits, malt liquors, perfumed spirits, motor spirit, and tobacco, but it may be taken that there are no important exports of local produce of any kind.

V.—Natural Resources.

A.

There is no agricultural, forest, or mineral production. A small amount of fishing is done, entirely for local consumption. The estimated value of the fish caught during the year 1933 was £2,520. There are 48 local licensed fishing boats, employing some 70 fishermen.

B.

FOOD SUPPLY.

In view of the lack of any land suitable for agriculture, the Colony is almost wholly dependent on importations for all kinds of food-stuffs and must necessarily be so.

VI.—Industry.

The only industrial establishments are:—

- (i) shipbuilding and repairing yards, and foundries. Apart from the Naval Dockyard, these are small and can only undertake minor repairs. About 85 men are employed in them;
- (ii) a few small tobacco factories.

VII.—Other Economic Activities.

The principal economic occupation of Gibraltar is the supply of coal, fuel oil, stores, and fresh water to shipping. There is also a considerable transshipment trade in goods for Spain and Morocco and some re-export trade with the same countries.

For some years now, a publicity campaign has been conducted with a view to bringing before the public the advantages of Gibraltar as a Tourist Resort and Travel Centre. This campaign is still proceeding energetically and the number of tourists visiting the Colony has shown a steady and satisfactory increase. Many tourists take advantage of the facilities available for using Gibraltar as a centre for visiting Spain and Morocco and a great number also land from cruising steamers and from mail steamers during the few hours which they spend in the Harbour.

Another source of income is the expenditure in connexion with the naval establishment and garrison.

No estimate of the amount of these various sources of income (which together make up the whole economic resources of the Colony) is available.

VIII.—Communications.

Some 5½ miles of roads in the city and 8½ miles outside supply adequate internal communications.

External communications are predominantly by sea. There are frequent services with all important world ports, e.g., by the Peninsular and Oriental Services from London to India, the Far East and Australia and by numerous other lines. Mails to the United Kingdom and the Continent are forwarded by steamer to Algeciras (the service with which receives a Government subsidy of £500) and thence overland. There is also road communication with the mainland of Spain.

IX.—Tariff.

As already indicated, Customs duties are not charged except on alcoholic liquors, tobacco, and motor spirit, on which specific duties are charged, with lower duties for British Empire produce.

X.—Trade Representatives.

There are no Colonial trade representatives in the United Kingdom or elsewhere.

MALTA.

I.—Situation, Area, etc.

The Colony of Malta consists of the two main islands of Malta and Gozo, the small island of Comino and a few very small islands lying immediately off the coasts of the larger islands.

The islands are situated in the Mediterranean, in latitude 14° E. and longitude 35° and 36° N. between Sicily and the North African coast.

The total area of the Colony is 121,844 square miles (about 77,980 acres) of which 94,870 square miles is the area of Malta, 25,899 square miles the area of Gozo, and 1,075 square miles the area of Comino. The islands contain a high proportion of rocky, uncultivable waste land. Although every available part of the islands is cultivated, the area under cultivation in 1932-33 hardly exceeded 42,000 acres. The land is all divided into small-holdings, the number in 1933 being 236 below 10 acres, 10,864 between 11 and 50 acres, and no larger holdings.

The climate is on the whole pleasant and equable and particularly agreeable during the winter. The summer months are normally almost entirely rainless, particularly during the scirocco. The highest monthly maximum in 1933 at the Meteorological Station at Valletta, the capital of the Colony was 94.7° F. (in July) and the lowest monthly maximum was 58° F. (in March). The lowest monthly minimum was 42.2° F. (in February) and the highest monthly minimum 67.2° F. (in September). The total rainfall at Valletta in 1933 was 21.21 inches; less than .05 inches fell in the month of July. The mean rainfall as measured at a number of places throughout the islands in 1933 was 22 inches for Malta, 23.58 inches for Gozo, and 18.93 inches for Comino.

II.—Population, etc.

The islands are very densely populated and the continued increase in the population is giving grounds for serious concern. The last census was held on 26th April, 1931. At that date the population of the whole Colony was 241,621, representing a density of 2,016 persons per square mile; the population of Malta itself was 217,784, representing a density of 2,327 per square mile and that of Gozo was 23,837, representing a density of 918 per square mile. By the 31st of December, 1933, it was estimated that the figures had increased to the following:—

					Total population.	Density per square mile.
Malta	...	...	...	...	227,046	2,393.2
Gozo	...	...	...	...	24,786	918.1
				Total	251,832	2,066.8

In the year 1933, in spite of an infant-mortality of a little over 250 *per mille*, births exceeded deaths by 3,230. The figures of density are all the more alarming when it is remembered that so great a proportion of the islands is uncultivable. If the density per cultivable square mile be calculated, it appears that the density is something like 3,758 per square mile in Malta and Gozo.

In these circumstances it is not surprising that emigration on a large scale has been regarded as an economic necessity to Malta, and the time is being awaited when world conditions may improve to such an extent as to allow of a relaxation of the barriers which have been placed in the way of immigration in all countries. During 1933, 1,321 emigrants left the islands and 961 returned, the net efflux being 360, a little more than 0·1 per cent. of the population.

The principal domiciled Maltese communities overseas, the results of emigration in previous years, are in Australia, the United States of America and North Africa, but small Maltese communities are also found in other parts of the world.

About a quarter of the population is accommodated in the towns of Valletta, Floriana, Vittoriosa, Senglea, and Cospicua, which are grouped round the two great harbours, the Grand Harbour and Marsa Muscetto, and another third of the population lives in neighbouring villages which constitute the suburban area. The principal source of employment for these people is the Naval Dockyard, and the harbours, and numbers are engaged in trade and the small industries referred to in Section VI below, but considerable difficulty is experienced in finding occupation for the unskilled labourers who constitute the majority of the working population.

The remainder of the population, are occupied in agriculture, which constitutes the principal industry of both the islands.

The following is a brief summary of the occupations of the population (of the age of five years and upwards) as declared at the 1931 census:—

	<i>Male.</i>	<i>Female.</i>	<i>Total.</i>
I. Professional—			
Local Government officials	1,545	15	1,560
Army and Navy	2,283	—	2,283
Roman Catholic Secular Clergy	643	—	643
Monastic Orders	506	—	506
Nuns and Sisters	—	940	940
Other professional	3,092	1,245	4,337
	8,069	2,200	10,269
II. Personal or domestic—			
Domestic servants	1,550	4,741	6,291
Other	1,604	1,288	2,892
	3,154	6,029	9,183
III. Commercial—			
Merchants, dealers, and agents	9,251	1,912	11,163
Persons connected with commerce	2,887	619	3,506
Conveyance of persons and goods	7,837	27	7,864
	19,975	2,558	22,533
IV. Agricultural—			
Fields and pastures	10,987	2,456	13,443
Gardens	181	1	182
Animal tending	51	3	54
	11,219	2,460	13,679
V. Industrial—			
Wood and furniture	4,030	8	4,038
Metal workers	3,448	7	3,455
Stone and lime workers	3,419	17	3,436
Food, drink, and tobacco	3,094	400	3,494
Other	11,938	4,823	16,761
	25,929	5,255	31,184
VI. Unoccupied and unproductive—			
Private means	528	330	858
Pensioners	1,265	88	1,353
Scholars and children	24,200	22,062	46,262
Other	8,900	69,282	78,182
	34,893	91,762	126,655

III.—Finance.

A. CURRENCY AND BANKING.

1. The currency in circulation consists of British coins and Bank of England notes. There is no local issue of currency notes.

It was estimated at the end of 1933 that £35,000 of silver and bronze coins and £700,000 of Bank of England notes were in circulation.

2. There are three local banks, the Bank of Malta, the Anglo-Maltese Bank (which maintains a branch in Gozo, the only bank in that island), and Scicluna's Bank (a private bank).

Barclays Bank (Dominion, Colonial, and Overseas), the Banco di Roma, and the Credit Foncier d'Algerie et de Tunisie all maintain branches in Valletta.

3. There is a Government Savings Bank with a branch in Gozo.

	<i>Number of Depositors on 31st March, 1933.</i>	<i>Amount standing to credit of Depositors on 31st March, 1933.</i>
Malta	11,548	1,126,381
Gozo	587	62,931
	12,135	1,189,312

The Government does not carry on any other form of banking business.

B. PUBLIC FINANCE.

1. *Public Debt.*

By a Proclamation on the 8th March, 1805, an import duty on wines, etc., was re-established for the purpose of paying interest on private capitals invested in the fund known as the "Massa Frumentaria" which in 1798 was appropriated by the French Government then in occupation of the Maltese Islands. The original amount of the debt, according to a revision of claims made in 1819, was £102,534, and the amount outstanding on the 31st March, 1933, was £79,081.

There is no other public debt.

2.—(a) *Revenue.*

Analysis of Revenue (on the basis of the estimates for the year 1934-35).

Self-balancing Departments.

	Revenue. £	Expenditure. £
Post Office	33,500	33,065
Telephone Service	8,200	10,563
Water Service	49,750	97,681
Electricity Supply	108,410	
	199,860	141,309
Net surplus ...	£58,551.	

General Revenue.

	£	Percentage of whole.
1. Customs	553,200	61·5
2. Licences, Stamp and other duties, Court fines, etc. ...	85,460	9·6
3. Rents	51,200	5·7
4. Lotto receipts	44,000	4·9
5. Fees of office and re-imbursements	44,500	5·0
6. Miscellaneous, interest and other receipts	59,661	6·7
7. Surplus on self-balancing Departments	58,551	6·6
Revenue of self-balancing Departments set-off against Expenditure	896,572 141,309	100·0
Total Revenue	£1,037,881	

(b) *Analysis of Import Duties for 1933.*

Amount of duty collected on articles imported from:—

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
Class I	64,044	61,432	223,616	349,092
Class II	17	—	2	19
Class III	53,796	604	121,079	175,479
Class IV	251	3	723	977
	118,108	62,039	345,420	525,567
Ships' Stores, ex. Baggage, etc.				1,259
Old deposits passed to Revenue				510
				527,336

3. *Expenditure (on the basis of the estimates for the year 1934-35).*

	£	Percentage of whole.
1. Debt Charges	4,148	0·5
2. Administration	298,996	32·6
3. Economic Development	105,778	11·5
4. Social Services	435,677	47·6
5. Non effective (i.e., pensions)	71,612	7·8
	916,211	100·0
Expenditure of self-balancing Departments set off against Revenue	141,309	
Total Expenditure	£1,057,520	

4. *Reserve Funds, etc.*

The Colony has no reserve fund and its only liquid asset is the Consolidated Revenue Fund which, on the 31st March, 1933, stood at £184,002.

5. *Grants-in-aid, &c.*

The Colony has received no grants or loans from the United Kingdom Exchequer since 1920-21.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total (excluding Ships' Stores).</i>
			£	£	£	£
1913	...	...	72,021	28,186	376,439	476,646
1930	...	...	14,461	14,086	266,966	295,513
1931	...	...	24,099	14,174	312,504	350,777
1932	...	...	57,822	9,971	211,314	279,107
1933	...	...	30,063	8,358	191,526	229,947

The value of exports for Ships' Stores, Bunkers and Seaplane Stores for the years in question was as follows:—

			£				£
1913	...	...	...	677,717	1932	...	110,569
1930	...	...	...	187,419	1933	...	110,948
1931	...	...	...	148,278			

(ii) *Domestic Exports by Classes, 1933.*

<i>To—</i>			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total.</i>
			£	£	£	£	£
United Kingdom	...	...	9,525	1,508	557	—	11,590
Ceylon	...	...	5,170	—	—	—	5,170
Other British countries	...	...	2,341	15	349	—	2,705
<i>Total Empire</i>	...	...	17,036	1,523	906	—	19,465
Holland	...	...	61,650	—	—	—	61,650
Italy	...	...	2,562	17,617	2,400	—	22,579
Tunis	...	...	7,817	116	240	20	8,193
Other foreign countries	...	...	15,425	8,696	1,879	12	26,012
<i>Total foreign countries</i>	...	...	87,454	26,429	4,519	32	118,434
<i>Ships' Stores</i>	...	...	5,546	—	—	—	5,546
GRAND TOTAL	...	...	110,036	27,952	5,425	32	143,445

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>	<i>Quantity.</i>	<i>Value.</i>	<i>Principal countries of Destination with value in £'000.</i>
		£	
<i>Class I.</i>			
Vegetables—			
Potatoes	203,400 cwt.	79,368	Holland (59), United Kingdom (7), Ceylon (5). Belgium (4), Germany (2), Italy (2).
Onions	23,837 cwt.	2,360	Holland (1).
Other kinds...	—	77	
		81,805	
Beer	126,911 gal.	11,437	Tunis (6), Ships' Stores (2), Palestine (1).
Cumin Seed	5,228 cwt.	7,757	Germany (2), Holland (2), Egypt (1).
Cigarettes and tobacco	13,946 lb.	4,563	Ships' Stores (3).
Animal Food	13,483 cwt.	3,009	United Kingdom (1), Lybia (1), France (1).
<i>Class II.</i>			
Hides and Skins	7,904 cwt.	13,410	Italy (8), Greece (3), France (1), Lybia (1).
Metals—old and scrap	59,729 cwt.	5,392	Italy (5).
Tallow	2,300 cwt.	2,845	Italy (2).
Stone, blocks	—	2,424	Greece (2).
<i>Class III.</i>			
Coke	1,104 tons	1,480	Italy (1).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
			£	£	£	£
1913	...	...	1,199,404	64,183	1,324,906	2,588,493
1930	...	...	992,658	281,737	2,542,236	3,832,880*
1931	...	...	921,686	243,636	2,532,091	3,713,272*
1932	...	...	950,864	228,441	2,123,413	3,317,659*
1933	...	...	1,001,777	196,171	2,269,990	3,479,054*

* Includes imports on account of Army and Navy Departments, baggage, etc., but excludes Ships' Stores, as follows:—

	<i>Army & Navy Depts. baggage etc.</i>	<i>Ships' Stores.</i>
	£	£
1930	16,249	3,380
1931	15,859	1,258
1932	14,941	1,548
1933	11,116	2,808

(ii) Imports by Classes, 1933.

From—	Class I. £	Class II. £	Class III. £	Class IV. £	Total. £
United Kingdom	384,050	50,228	552,712	4,787	991,777
Australia	96,902	5	1,163	—	98,070
Canada	72,580	—	75	—	72,655
Rest of Empire	17,586	14	6,776	170	24,546
<i>Total Empire</i>	<i>571,118</i>	<i>50,247</i>	<i>560,726</i>	<i>4,957</i>	<i>1,187,048</i>
Italy	272,149	34,543	187,445	99	494,236
Roumania	37,608	643	222,008	210	260,469
Germany	18,857	40,400	131,600	—	190,757
Turkey	141,799	23,721	42	62	165,624
United States of America... ..	101,994	129	35,066	—	137,189
Egypt	36,495	685	82,822	60	120,062
Holland	98,552	302	20,304	—	119,158
Japan	4,497	480	111,260	—	116,237
Belgium	31,463	299	65,082	—	96,844
France	37,549	4,097	40,271	—	81,917
Jugo-Slavia	37,520	15,032	11,040	166	63,758
Greece	58,785	—	196	—	58,981
Tunis	15,066	547	36,103	5,287	56,973
Other foreign countries	203,108	8,797	96,511	269	308,685
<i>Total foreign countries</i>	<i>1,095,432</i>	<i>129,675</i>	<i>1,039,650</i>	<i>6,133</i>	<i>2,270,890</i>
Ships' Stores	1,640	1,114	54	—	2,808
Army and Navy Departments and other items	1,997	132	8,951	36	11,116
GRAND TOTAL	£1,670,187	£181,168	£1,609,381	£11,126	£3,471,862

In addition there were imports of bullion and specie from the United Kingdom to the value of £10,000.

(iii) Principal Imports, 1933.

Class I.	Article.	Quantity.	Value. £	Principal countries of origin and value in £'000
Animal Foods—				
Pulse (all kinds)	...	511,860 cwt.	157,205	Italy (129), Turkey (25), Syria (3).
Barley	...	213,846 "	40,974	Turkey (24), Roumania (10), Russia (3).
Indian Corn	...	156,058 "	30,639	Roumania (24), Turkey (3).
Bran	...	109,528 "	24,065	Egypt (14), Tunis (4), Italy (3).
Saggina	...	92,010 "	24,730	Turkey (14), Egypt (7), Syria (3).
Other kinds	...	—	1,714	Algiers (1).
			279,327	
Wheat ... 31,688 tons 186,599				
Animals, living—				
Store bullocks, etc.	...	13,908	89,877	Canada (53), Australia (49), United States of America (34), Argentine Republic (19), Russia (12), Italy (6), Hungary (4), Germany (4).
Fattened bullocks, etc.	...	3,104	24,616	Turkey (51), Jugo-Slavia (25), Hungary (4), Bulgaria (3), Tunis (3).
Sheep and Swine	...	4,749	10,935	Turkey (15), Jugo-Slavia (7).
Poultry	...	—	404	Greece (10).
			125,832	
Flour and Semola ... 265,384 cwt. 117,754				
Wines (all kinds) ... 1,979,533 gal. 85,834				
Milk, fresh or preserved—				
Condensed	...	62,533 cases	63,885	Australia (41), United States of America (22), Egypt (18), Italy (14), Canada (8), United Kingdom (6).
Powder	...	1,232 "	4,286	Greece (44), Italy (16), Spain (9), United Kingdom (8), France (3), Cyprus (2).
Evaporated...	...	3,182 "	2,932	Holland (34), Switzerland (8), United Kingdom (7), Norway (5), Denmark (2), Austria (2), Belgium (2), Canada (2).
Other kinds	...	1,634 "	1,511	United Kingdom (3).
		68,581 "	72,614	United Kingdom (2).
Sugar ... 9,837 tons 70,694				
Tobacco—				
Cigarettes	...	110,430 lb.	43,245	United Kingdom (56), Belgium (7), Dutch East Indies (3), Germany (2).
Unmanufactured	...	745,136 "	23,004	United Kingdom (42).
Other kinds	...	7,882 "	2,351	United States of America (12), Greece (3), Holland (2), United Kingdom (2), Germany (2).
		853,448 "	68,600	United Kingdom (2).

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>				<i>Quantity.</i>	<i>Value £</i>	<i>Principal countries of origin and value in £'000.</i>
<i>Class I—continued.</i>						
Butter and substitutes	...			19,501 cwt.	55,777	United Kingdom (37), Holland (17).
<i>Edible Oils—</i>						
Cotton and other seed	...			446,527 gal.	49,006	United Kingdom (29), Holland (8), Denmark (7), Germany (2), Belgium (2).
Olive	...	...	...	26,906 „	5,292	Tunis (2), Italy (2).
				473,433 „	54,298	
Coffee and substitutes	...			25,043 cwt.	53,973	Brazil (35), Holland (7), Austria (4), Italy (3), France (2).
<i>Meats—</i>						
Ham, bacon, etc.	...	...	...	6,812 cwt.	24,700	United Kingdom (19), Denmark (2), Holland (2).
Fresh or frozen	...	...	...	2,293 „	5,671	Australia (4).
Tinned and potted	...	...	...	6,648 „	14,528	Argentine Republic (8), Paraguay (2).
Other kinds	...	...	...	3,476 „	8,137	Italy (3), United Kingdom (2).
				19,229 „	53,036	
<i>Fish—</i>						
Fresh	...	...	...	—	17,503	United Kingdom (10), Italy (6).
Salt cured, dried, etc.	...	...	...	—	18,606	United Kingdom (7), Newfoundland (3), Italy (3).
Otherwise preserved	...	...	...	—	14,417	Japan (4), United Kingdom (3), Italy (3), Morocco (2).
					50,526	
Cheese	...	...	...	13,706 cwt.	47,848	Italy (32), United Kingdom (12).
Lard and substitutes	...	...	...	24,916 „	47,558	United States of America (28), Holland (7), Canada (5), United Kingdom (3), Belgium (2), Denmark (2).
Spirits	...	...	...	71,730 gal.	45,103	United Kingdom (31), France (7), Holland (4).
<i>Fruit—</i>						
Fresh	...	...	...	—	21,455	Italy (13), Canary Islands (3), United Kingdom (2).
Dried	...	...	...	—	16,766	Italy (9), United Kingdom (3).
Preserved	...	...	...	—	3,609	United Kingdom (2), United States of America (1).
					41,830	
<i>Vegetables—</i>						
Fresh (all kinds)	...	...	...	—	32,884	United Kingdom (19), Holland (5), Lybia (4), Italy (2).
Olives in brine	...	...	...	—	3,194	Italy (3).
Preserved	...	...	...	—	3,954	United Kingdom (1), Belgium (1).
					40,032	
<i>Class II.</i>						
Coal	...	...	...	75,275 tons	85,563	United Kingdom (41), Germany (39), Turkey (5).
Wood and timber (unmanufactured)	...	...	...	—	46,298	Italy (19), Jugo-slavia (14), United Kingdom (7).
<i>Class III.</i>						
<i>Oils—</i>						
Motor Spirit	...	...	...	3,595,969 gal.	243,240	Roumania (14), Egypt (80), United Kingdom (2), Tunis (2).
Petroleum	...	...	...	5,166,197 „	89,734	Roumania (81), Russia (4), Italy (4).
Patent Fuel	...	...	...	5,630 tons	20,765	Dutch West Indies (all).
Gas	...	...	...	76 „	291	
Other kinds	...	...	...	—	9,421	United Kingdom (5), Holland (2).
					363,451	
<i>Cotton Manufactures</i>						
Piece goods	...	...	...	4,783,765	104,579	United Kingdom (43), Japan (31), Italy (27).
Other kinds	...	...	...	—	29,457	United Kingdom (12), Japan (7), Italy (6).
					134,036	
<i>Motor Cars and parts—</i>						
Motor cars	...	...	...	743	69,924	United Kingdom (45), United States of America (16), Italy (8).
Motor car parts, etc.	...	...	...	—	14,636	United Kingdom (6), United States of America (4), Italy (3).
					84,560	
Hardware	...	...	...	—	69,814	Germany (28), United Kingdom (19), Italy (5), Belgium (4), Sweden (3), Holland (2), Austria (2).
Apparel	...	...	...	—	69,097	United Kingdom (38), Japan (11), Italy (8). France (4), Germany (3).

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Quantity.</i>	<i>Value. £</i>	<i>Principal countries of origin and value in £'000.</i>
<i>Class III.—continued.</i>			
<i>Silk and Artificial Silk Manu- factures—</i>			
Piece Goods	993,599 yd.	49,745	Japan (22), Italy (9), Switzerland (8).
Other kinds... ..	—	13,178	Japan (6), Italy (2), United Kingdom (2).
		62,923	
<i>Woollen Manufactures—</i>			
Piece goods... ..	440,765 yd.	44,394	United Kingdom (34), Germany (6), Italy (3).
Other kinds	—	9,604	United Kingdom (7).
		53,998	
<i>Soap—</i>			
Laundry	33,209 cwt.	36,247	Tunis (31), United Kingdom (2), Algiers (2).
Other kinds	—	8,203	United Kingdom (7).
		44,450	
Boots and shoes	428,866 pr.	43,829	United Kingdom (18), Japan (11), Czecho-Slovakia (6), Italy (5).
<i>Machinery and implements—</i>			
Agricultural	—	4,979	United Kingdom (3), United States of America (1).
Industrial	—	31,372	United Kingdom (18), Italy (6), Germany (5).
Other kinds... ..	—	6,133	United Kingdom (5).
		42,484	
Drapery and Hosiery—	—	38,494	United Kingdom (24), Italy (5), Japan (4), Ger- many (3).
Haberdashery... ..	—	35,522	United Kingdom (12), Italy (10), Germany (5), Japan (3), France (2).
Glass and Glassware	—	34,773	Belgium (14), Germany (8), Czecho-Slovakia (4), Italy (3), United Kingdom (3).

V.—Natural Resources.

A.

1.—AGRICULTURE.

All land suitable for farming is closely cultivated.

The crops produced are designed primarily for local consumption, the areas under different crops and the total amount of crops harvested in the "agricultural year" June, 1932-May, 1933, being as follows:—

	<i>Areas under cultivation in acres.</i>	<i>Crop reaped.</i>
Forage	12,348	457,270 loads (of 10 bundles)
Wheat	9,617	38,082 qr.
Potatoes	3,875	10,822 tons
Barley	3,477	18,997 qr.
Meslin (Mischiato)	2,156	10,738 qr.
Vines and other fruits	2,892	223,349 cwt.
Cuminseed	1,095	4,991 cwt.
Vegetables	3,045	221,119 cwt.
Beans and peas	1,985	8,868 qr.
Onions	1,394	9,442 tons
Cotton	66	16,325 lb.
Maize	137	566 qr.
Citrus	188	148,090 dozen.
	42,275	

The total area under cultivation, however, was somewhat less than this, as the maize was grown chiefly as a second crop after potato or forage. The production for the year compares favourably with last year's. There was a record crop of grapes. The only products important for the export trade are potatoes and cumin seed, more than half the total production of which is exported, and onions of which only a relatively small proportion is exported.

The whole of the meslin and about half the cotton is grown in Gozo, but otherwise the cultivation is distributed fairly evenly over the two islands.

The yield of wheat was about 4 quarters per acre. The cultivation of cotton is dwindling from year to year, owing to lack of markets.

The total quantity of grapes available for the press was estimated at about 150,000 cwt. with an estimated yield of 1,140,000 gallons of wine, the whole of which was consumed locally.

Exports of onions, potatoes, and cumin seed and the principal countries of destination for the past five years were as follows:—

	1929.		1930.		1931.		1932.		1933.	
	Quantity in cwt.	Value in £.	Quantity in cwt.	Value in £.	Quantity in cwt.	Value in £.	Quantity in cwt.	Value in £.	Quantity in cwt.	Value in £.
Onions—										
United Kingdom ...	2,420	435	5,385	663	7,096	1,442	12,498	3,064	2,510	414
Holland ...	43,661	7,513	19,254	2,829	15,296	3,618	42,084	7,846	13,672	1,027
Italy ...	17,281	2,823	11,299	2,227	380	175	8,267	2,018	—	—
Tunis ...	9,125	2,653	6,145	1,451	3,812	913	3,447	872	3,281	537
Other Countries ...	10,810	2,078	7,792	1,217	2,326	636	1,998	655	4,374	382
	83,297	15,502	49,875	8,387	28,910	6,784	68,294	14,455	23,837	2,360
	Quantity in tons.		Quantity in tons.		Quantity in tons.		Quantity in tons.		Quantity in tons.	
Potatoes—										
United Kingdom ...	239	2,891	—	—	496	5,172	1,448	14,701	648	6,842
Ceylon ...	739	6,527	1,799	12,060	1,841	13,350	690	5,526	1,048	5,169
Holland ...	6,753	61,823	6,083	55,201	7,604	78,792	6,619	67,731	7,140	58,604
Germany ...	2,189	25,159	1,081	9,849	604	6,010	538	6,174	342	2,236
Italy ...	1,214	14,134	514	4,965	300	3,714	296	3,581	169	1,666
Belgium ...	331	3,275	16	100	164	1,520	310	3,612	665	3,938
Other Countries ...	2,018	14,594	959	6,645	933	6,877	524	3,729	158	913
	13,483	128,403	10,452	87,810	11,942	115,235	10,425	105,054	10,170	79,368
	Quantity in cwt.		Quantity in cwt.		Quantity in cwt.		Quantity in cwt.		Quantity in cwt.	
Cumin Seed—										
Germany ...	1,062	2,420	1,466	3,405	1,623	3,522	1,903	1,993	1,611	2,226
Holland ...	2,219	5,668	2,433	5,951	2,092	3,900	788	918	1,117	1,730
France ...	2,022	4,489	950	2,076	556	890	1,353	1,328	362	500
Other Countries ...	3,176	8,165	1,571	4,018	2,340	3,980	2,595	3,558	2,138	3,301
	8,479	20,742	6,420	15,450	6,611	12,292	6,639	7,797	5,228	7,757

2. FORESTS.

There are no commercially important forests or woodlands in Malta.

3. ANIMAL HUSBANDRY.

The animal population of the islands is comparatively large, the estimated number in 1933 being:—

Horses ...	3,214	Sheep ...	20,008
Asses ...	4,229	Goats ...	28,856
Mules ...	3,044	Pigs ...	4,336
Horned cattle ...	4,129		

The staple food-stuff of the local population is bread, but meat is consumed to some extent particularly by the military garrison and the crews of His Majesty's ships, and, in addition to the products of the local herds, considerable numbers of live animals are imported for food (17,012 bullocks and other similar animals and 4,749 sheep and swine in 1933).

4. MINERALS.

Almost the whole of the islands have been geologically surveyed, but the only known mineral of economic value is limestone, which is quarried on an extensive scale.

In 1933 over twelve million cubic feet of globigerina limestone, valued at £203,334 and over six hundred thousand cubic feet of coralline limestone valued at £13,125 were extracted. Almost the whole of this is utilized locally, but small quantities are exported to neighbouring Mediterranean countries.

There is a small production of lime (576,000 bushels valued at £8,700 in 1933) and common salt (32,000 bushels in 1933), the whole for local consumption.

5. FISHERIES.

The fishing industry in Malta is fairly considerable. In 1933, 797 boats were registered as engaged in fishing and the landed value of the catch was estimated at about £34,000, about 60 different varieties of fish being included in the returns. About 3,500 persons were engaged in fishing, but more than half of these also had other vocations. The number of persons who lived exclusively by fishing was shown as 1,319 in the 1931 census. The industry is mainly dependent on inshore fishing but the foundations have been laid of a deep-sea fishing industry by the use of motor power and larger craft for exploiting distant fishing grounds. In 1932 fishing with the *lampara* (purse seine net) consisting of attracting shoals of migratory fish to a strong glaring light, to be subsequently surrounded by a circular net with a quasi flat bottom layer and the purse at its end, was introduced for the first time in Malta by foreign fishermen. Local fishermen have now adopted this method of fishing which is giving very good results.

B.

FOOD SUPPLY.

The local production of wheat is not, and cannot be, adequate to meet local requirements, and it is estimated that over three-quarters of the total requirements of wheat have to be imported. Considerable stocks are maintained in the public granaries.

Very large quantities of food-stuffs are imported, the average value during recent years being somewhat over £1,500,000 annually. Not all these are consumed by the local population, much of these supplies being no doubt consumed by the military garrison and the crews of His Majesty's ships, but even after allowing for this, the islands are, and must continue to be, far from self-supporting.

VI.—Industry.

There are a number of small local industries in the islands. The only manufactured goods produced for export in substantial quantities are beer, smoking pipes, cigarettes (made from imported tobacco) and rags and shoddy. There are a number of other industrial establishments catering principally for the home market, as shown in the list below, but in some cases, particularly in that of wine, the persons engaged in the industry have other vocations as well.

Industry.	Number of establishments or factories.	Number of persons employed.
Natural wine	376	unknown
Cigarettes	85	696
Furniture and cabinet making	148	580
Distilling orange-flower water	57	unknown
Goldsmiths and silversmiths	53	95
Confectioneries	50	181
Printing	31	196
Mineral-water Manufacture	30	174
Laundries, etc.	34	179
Boat-builders (including lighters)	26	142
Flour-mills	22	151
Breweries	4	227
Carbonic Acid	1	8
Shoddy and Wadding	4	18
Boot furniture and metal polish	1	8
Earthenware and Chinaware	3	33
Block chocolate	2	43
Mirrors... ..	2	14
Soda Crystals... ..	1	20
Smoking Pipes (parts and accessories)	1	15
Crown Corks	1	41

The principal single source of industrial employment is of course His Majesty's Dockyard which normally employs about 6,700 Maltese.

VII.—Other Economic Activities.

Entrepôt Trade.—The visible entrepôt trade of Malta is not very large. The total value of ordinary re-exports in 1933 was £92,048 of which £18,473 went to the United Kingdom, £16,811 to Italy, and £45,811 to Egypt. In addition £24,391 of His Majesty's ships' stores were re-exported, £4,282 of other ships' stores, £74,754 of merchant ships' bunkers, and £1,975 of seaplane stores. Valletta is, however, one of the major ports of the Mediterranean, and the earnings of the port are no doubt an important item in the invisible exports which go to meet the very heavy adverse balance of the visible trade.

Tourist Traffic.—Tourist traffic to these Islands is steadily increasing. Besides passengers from cruising steamers which numbered 24,928, the returns show that 83,749 passengers landed at Malta in 1933. The approximate revenue derived from passengers arriving by cruising steamers was estimated at £37,300.

Other considerable items of income are the personal expenditure of the military garrison, the crews of His Majesty's ships and their families, and the family remittances of Maltese communities abroad which amounted to about £11,800 through the Post Office alone in 1933.

VIII.—Communications.

There is an excellent system of roads throughout the Islands. In Malta there are 288 miles of 1st class roads suitable for motor traffic, 75 miles of which are asphalted, and 76·5 miles of 2nd class roads suitable for horse traffic, but not normally for motor traffic. In Gozo there are 68 miles of 1st class of which 4 miles are asphalted and 16·5 miles of 2nd class roads. A large fleet of motor buses owned by private firms provides services between Valletta and the principal other towns and villages. The total number of buses licensed in 1933 was 565 and in addition there were 458 touring cars used for hire, as well as 246 commercial vans, 1,679 privately-owned touring cars, and 354 privately-owned motor cycles, apart from the motor vehicles owned by the Civil Government and the Service Departments. The figures for Gozo were 21 motor buses, 37 touring cars for hire, 14 other touring cars, 1 commercial van, and 10 motor cycles.

The metre gauge railway which formerly ran from Valletta to the centre of the Island was closed in March, 1931, having been operated at a loss for some time.

Communication between Malta and Gozo is maintained by various small craft.

The Cassar Company, Limited, maintain a service of steamers which carries the mails between Malta and Syracuse six times weekly. There are frequent passenger and cargo services to the United Kingdom and all Mediterranean ports, as well as to the ports reached via the Suez Canal and occasional direct services to New York and other more distant ports. Not less than 40 British and foreign Steamship Companies use the ports of Malta in most cases for regular services.

In the year 1933 25 British and 859 foreign sailing vessels of a total tonnage of 2,975 and 28,192 tons respectively, and 714 British and 996 foreign steam vessels of a total tonnage of 1,957,863 and 1,856,703 tons respectively entered at Valletta.

IX.—Tariff.

Duties are levied on imports in accordance with the following general scheme:—

(i) An extensive list of goods are exempted from duty, including many food-stuffs, practically all animal foods, and certain manufactured articles imported generally in connection with local industries.

(ii) Goods listed in another schedule are subject to various specific duties. These include alcoholic liquors, tobacco, mineral oils, and some food-stuffs, e.g., wheat, meat, sugar, edible oils and salt.

(iii) A few manufactured articles are subject to special *ad valorem* rates varying from 15 per cent. to 35 per cent. These include boot, furniture and motor polish; confectionery and chocolate; preserved fruits; gold, silver and electro-plated goods; lace; motor vehicles; wireless sets and parts thereof.

(iv) All other goods are subject to an *ad valorem* duty of 10 per cent. or 20 per cent. *ad valorem* (in the latter case the preferential rate of duty is 10 per cent.).

Up to January, 1917, only specific duties were levied. After that date, *ad valorem* duties were adopted, and on 1st April, 1934, preferential duties were introduced in respect of certain articles included under heads (ii), (iii), and (iv) above.

X.—Trade Representatives.

The Malta Government maintains an Agency in London which concerns itself with commercial matters.

PALESTINE (MANDATED TERRITORY).

I.—Situation, Climate, etc.

Palestine lies on the western edge of the continent of Asia, at the eastern extremity of the Mediterranean Sea, between latitude 30° and 33° N. and longitude 34° 30' and 35° 30' E., and is bounded by the Mediterranean on the west, Syria on the north, Trans-Jordan on the east, and the Egyptian Frontier District of Sinai on the south. The average length (north to south) is 160 miles, the average width less than 70 miles, and the total area about 10,100 square miles (about the size of Wales).

The country may be divided into three main geographical areas. The coastal strip, tapering from a width of 20 miles in the south to practically nil at Mount Carmel in the north, is fertile sand and sandy loam. North of Carmel it widens again until it joins the plain of Esdraelon to the east and the hilly country on the Palestine-Syrian frontier in the north. The second strip is made up of the Galilee highlands in the north, the plain of Esdraelon, and the mountains of Samaria and Judea further south. The highlands are generally rugged and stony but there are numerous olive groves and patches of fertile land. Esdraelon is proverbially fertile. The third strip is the Jordan valley, a depression varying from 600 feet to 1,300 feet below sea level.

The principal towns are the capital, Jerusalem, in the hills of Judea (approximate population 100,000), the ports of Haifa (approximately 65,000), and Jaffa (approximately 65,000) and Tel-Aviv, an entirely Jewish township contiguous to Jaffa (approximately 100,000).

The climate is of Mediterranean type, i.e., warm and dry in the summer and mild in the winter with periodical heavy rain and cold winds, but there are distinct variations between the three main natural areas of the country. The coastal strip is equable; the highland strip shows a greater seasonal and daily range of temperature, and the Jordan valley is hotter both in winter and summer, when the heat becomes oppressive, the mean daily maximum in summer being 100° F. The mean annual rainfall which is concentrated mainly in the months of December, January, and February, is about 18 inches and a great deal depends on this mean quantity being maintained.

The average seasonal rainfall varies considerably in different parts of Palestine.

The following are the most significant figures for the season 1933-34 recorded at the official stations.

Station.	Monthly Maximum		Monthly Minimum.		Rainfall 1933-34.	Average over a period of years.	Number of years.
	Highest.	Lowest.	Highest.	Lowest.			
	Fahrenheit.	Fahrenheit.	Fahrenheit.	Fahrenheit.	Inches.	Inches.	
Acre ...	107·6 June	73·0 January	63·5 August	34·9 January	19·2	22·6	9
Haifa ...	99·8 June	73·6 January	70·7 August	38·1 December	23·6	24·8	22
Jenin ...	109·6 June	66·6 January	65·3 August	35·1 December	13·1	19·0	13
Tel-Aviv ...	99·6 June	74·3 January	67·3 August	38·8 December	16·2	20·9	29
Jerusalem ...	104·0 June	65·1 January	55·4 August	26·6 December	15·6	25·5	86
Jericho ...	116·6 June	77·6 January	69·8 August	35·9 December	3·7	4·5	11
Gaza ...	111·6 June	79·0 January	63·7 August	36·1 December	15·8	14·9	23
Beersheba ...	114·8 June	77·4 January	54·5 August	32·5 January	13·4	7·5	13
Beisan ...	113·0 June	77·0 January	64·2 August	33·1 December	8·4	10·4	8
Beit Gamal ...	112·8 June	79·2 January– February	64·0 August	38·3 December	14·4	16·2	15

II.—Population.

The estimated settled population on the 30th September, 1934, was 1,119,000 compared with the 1931 census figure of 969,268 (exclusive of nomadic Beduin, estimated at 66,553). This figure was made up as follows:—

Moslems	...	...	...	...	...	...	...	743,000
Jews	...	...	...	...	...	...	...	265,000
Christians	...	...	...	...	...	...	...	100,000
Others	...	...	...	...	...	...	...	11,000
								1,119,000

In 1931, 41 per cent. of the settled population lived in urban areas and 59 per cent. in villages. The number of persons returned as principal earners was 280,398 and the greater part of those who pursued occupations were in the following main classes:—

Agriculture and pasture	...	133,799	Transport	...	...	16,142
Industry	...	44,364	Trade	...	...	26,495

Owing to its peculiar political position immigration is of great importance in the economic life of Palestine. Since its designation as the centre for a Jewish National Home there has been a continual immigration of Jews and much of the recent economic development has been the result of that immigration and the capital brought in by immigrants or to assist their establishment. In 1931, of 174,610 Jews in Palestine, 101,415, or 58 per cent. had been born elsewhere and a considerable proportion of the remainder were the children of immigrants.

In 1933 the total number of immigrants was 29,101 of whom 27,862 were Jews, 963 Christians, and 276 Moslems. In addition 2,876 (including 2,465 Jews) who had entered Palestine as travellers or without permission either during the year or earlier were registered as immigrants. Of the total number of registered immigrants 16,523 (16,504 Jews) came from Eastern Europe and 3,032 (2,429 Jews) from oriental lands. The remainder came mainly from Central Europe, the United States of America, and the British Empire.

Of the 30,327 Jewish immigrants registered in the year 1933, 11,165 with 7,788 dependants came in as working men and women, and 3,250 with 3,350 dependants as "capitalists", that is on the basis of a minimum capital of £1,000 each. 12,762 were men, 11,306 women, 3,196 boys, and 3,063 girls. 17,494 were between the ages of 18 and 35 years, 6,737 below the age of 18 years and 6,096 above that of 35 years. 1,689 (1,685 Jews) described themselves as agriculturists, 4,751 (4,710 Jews) as members of skilled urban trades, 1,814 (1,564 Jews) as members of professions, and 1,821 (1,814 Jews) as engaged in manufacture and commerce.

During the year 1934, 39,275 immigrants (38,244 Jews) settled in Palestine. In addition 4,668 others (4,115 Jews) who had entered as travellers or without permission, either during the year or earlier, were registered as immigrants.

Of the 42,359 Jewish immigrants registered during the year 10,892 (9,556 men and 1,326 women) with 11,153 dependants came as working men and women and 5,124 with 4,578 dependants as "capitalists". 17,134 were men, 15,570 women, 4,978 boys, and 4,677 girls. 21,141 were between the ages of 18 and 35 years, 10,905 below the age of 18 years and 10,313 above that of 35 years, 22,780 were nationals of Eastern Europe, and 3,815 came from oriental lands. The remainder came mainly from Central Europe, the United States of America, and the British Empire. 1,911 Jews described themselves as agriculturists, 6,038 as members of skilled trades, 1,807 members of professions, and 2,920 as engaged in manufacture and commerce.

The volume of immigration is controlled by the Government and is dependent on the economic absorptive capacity of the country. Special facilities exist for the admission of immigrants possessing certain property or other qualifications. Others are admitted in accordance with Labour Immigration Schedules decided half-yearly by the High Commissioner and based on an exhaustive examination of the economic situation. The most recent schedules provide for the admission of the following numbers of immigrants apart from dependants:—

April—September, 1933	...	...	5,500
October, 1933—March, 1934	...	...	5,500
April—September, 1934	...	...	6,800
October, 1934—March, 1935	...	...	7,500

III.—Finance.

A.—CURRENCY AND BANKING.

1. The Palestine pound, divided into 1,000 mils, is the unit of currency and is maintained at par with sterling by the Palestine Currency Board. The Board issues notes of £P.100, £P.50, £P.10, £P.5, £P.1, and 500 mils which are legal tender for the amounts expressed therein and subsidiary silver, nickel-bronze, and bronze coins of 100, 50, 20, 10, 5, 2, and 1 mils. The silver coins of 100 and 50 mils are legal tender for the payment of any amount not exceeding £P.2; nickel-bronze coins of 20 and 10 mils for the payment of any amount not exceeding 200 mils; and the bronze coins of 5, 2, and 1 mils for an amount not exceeding 100 mils.

The Board authorizes the issue of currency in Palestine against repayment in London; and arranges for issue, against currency tendered in Palestine, of drafts or telegraphic transfers payable in sterling in London.

The total amount of currency notes and coin in circulation at the 31st March, 1934, was £P.4,069,664.

2. There were on the 28th January, 1935, 82 registered Companies authorised to carry on banking business in Palestine of which 11 were foreign banks. There were at the same date, 12 Palestinian Co-operative Societies authorised to carry on banking business. The principal banks are as follows:—

American Express Co.—

Head Office in Palestine: Jerusalem.

Anglo-Palestine Bank, Ltd.—

Head Office in Palestine: Tel-Aviv.

Branches: Jerusalem, Jaffa, Haifa, Safad, Tiberias, and Petah-Tiqva.

Sub-Office: Rehovoth.

Arab Agricultural Bank—

Head Office: Jerusalem.

Banco di Roma—

Head Office in Palestine: Jerusalem.

Branches: Jaffa, Tel-Aviv, Haifa, and Tiberias.

Barclays Bank (Dominion, Colonial, and Overseas)—

Head Office in Palestine: Jerusalem.

Branches: Jaffa, Tel-Aviv, Haifa, Nablus, and Nazareth.

Sub-Office: Acre.

Holland Bank Union—

Head Office in Palestine: Haifa.

Jacob Japhet and Company—

Head Office: Jerusalem.

Polish Savings Bank—

Head Office in Palestine: Tel-Aviv.

Ottoman Bank, Ltd.—

Head Office in Palestine: Jerusalem.

Branches: Jaffa, Tel-Aviv, Haifa, and Tiberias.

Thos. Cook & Son (Bankers), Ltd.—

Head Office in Palestine: Jerusalem.

Branch: Haifa.

The remaining banks are either confined to localities or to communities and their business is not extensive.

3. There were, on the 30th November, 1934, 598 Co-operative Societies in Palestine which may be classified as under:—

(1) Agricultural Societies	...	...	...	...	...	...	212
(2) Industrial and Professional Societies	...	...	...	...	...	...	143
(3) Building Societies	...	...	...	...	...	...	96
(4) General Credit Societies	...	...	...	...	...	...	130
(5) Miscellaneous	...	...	...	...	...	...	17
							598

The total membership of these Societies is stated to be 113,413 with paid-up share capital of £P.463,500, deposits of £P.1,836,600 and reserve funds of £P.244,100.

The Government has no interest in any existing land or other banks with the exception of the Ottoman Agricultural Bank, which is in process of being wound-up.

The Government, however, issues, in times of agricultural depression, loans to agriculturists for the purchase of seed, agricultural implements, ploughing animals, forage, etc., at varying rates of interest with repayment in one or more annual instalments. The balance of these agricultural loans on the 31st March, 1934, was £P.181,347 of which £P.76,863 was issued in the year 1933-34.

Negotiations for the formation of an Agricultural Mortgage Company to grant long term loans to agriculturists, are being conducted by Government.

The aggregate deposits and balances of current accounts held by the Banks and Co-operative Credit Societies increased from approximately £P.4,500,000 at the 31st March, 1932, to some £P.12,500,000 at the 31st March, 1934.

B.—PUBLIC FINANCE.

1.—Public Debt.

At the 31st of March, 1934, Palestine had a debt of £4,475,000, being a 5 per cent. loan issued on the London market and guaranteed by His Majesty's Government in the United Kingdom. The charges, as provided in the Estimates for 1934-35, were:—

	£
Interest and management (including £124,166 borne on the Railway Estimates)	... 225,111
Sinking fund charges (including £32,294 borne on the Railway Estimates)	... 58,548
	283,659

The accumulated Sinking Fund at 31st March, 1934, was valued at £215,639.

2.—(a) *Analysis of Revenue (on the basis of Estimates for the year ending 31st March, 1935).**Self-balancing Departments.*

	Revenue. £P.	Expenditure. £P.	Balance. £P.
Posts and Telegraphs	273,100	263,493	+ 9,607
Palestine Railway	381,755	473,111	— 91,356
	<u>654,855</u>	<u>736,604</u>	<u>— 81,749</u>

Net Deficit £P.81,749.

	General Revenue.* £P.	Percentage.
I Customs	1,650,100	49·5
II Excise	281,000	8·4
III House, Land and Property Taxes	300,000	9·0
IV Fees, etc.	378,755	11·4
V Licences, Stamps, and other internal revenue	483,000	14·5
VI Port Dues, Rent, Interest, and Miscellaneous Revenue	240,800	7·2
	<u>3,333,655</u>	<u>100·0</u>
Revenue of self balancing Departments set off against Expenditure... ..	654,855	
Total	<u>£P.3,988,510</u>	

(b) *Analysis of Import Duties for 1933.**Amount of duty collected on articles imported from:—*

	United Kingdom. £P.	Rest of Empire. £P.	Foreign Countries. £P.	Total. £P.
Class I	89,000	57,000	619,000	765,000
Class II	1,000	20,000	48,000	69,000
Class III	81,000	1,000	772,000	854,000
	<u>£P.171,000</u>	<u>£P. 78,000</u>	<u>£P.1,439,000</u>	<u>£P.1,688,000</u>

3.—*Expenditure.**Analysis of Expenditure (on the basis of Estimates for the year ending 31st March, 1935).*

	£P.	Percentage.
I Deficit on "self-balancing" Departments (See 2(a))	81,749	2·9
II Debt Charges	127,199	4·5
III Administration	1,353,459	47·8
IV Economic Development	463,031	16·4
V Social Services	551,580	19·5
VI Defence†	228,390	8·1
VII Pensions	22,150	0·8
	<u>2,827,458</u>	<u>100·0</u>
Expenditure of self balancing Departments set off against Revenue	654,855	
Total ...	<u>£P.3,482,313</u>	

4.—*Reserve Funds, etc.*

At the 31st March, 1934, Palestine had no Reserve Fund, but there was a surplus of assets over liabilities of £P.2,510,932 of which £P.1,510,932 was estimated by the Treasury to represent "free" surplus after allowing for certain commitments. The assets held against these and other liabilities included investments of £P.2,026,839 and cash and deposits of £P.746,319.

5.—*Grants-in-aid, etc.*

Palestine has received no grants-in-aid from the United Kingdom Exchequer in recent years other than the contributions towards the cost of the Trans-Jordan Frontier Force, part of which is borne by His Majesty's Government, and a contribution from the Colonial Development Fund in 1933-34 towards the cost of a survey of a possible rail route between Haifa and Baghdad.

* Excluding United Kingdom grant-in-aid for the Trans-Jordan Frontier Force.

	£P.
† Total Expenditure	377,390
Less United Kingdom grant-in-aid	149,000
	<u>£P.228,390</u>

IV.—Trade Statistics.*

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
			£P.	£P.	£P.	£P.
1929	...	...	569,308	24,097	1,371,195	1,964,600
1930	...	...	715,023	51,863	1,313,143	2,080,029
1931	...	...	728,391	43,454	1,278,045	2,049,890
1932	...	...	1,410,007	84,632	2,636,411	4,131,050
1933	...	...	1,589,913	66,879	2,096,205	3,752,797

(ii) *Domestic Exports by Classes, 1933.*

<i>To</i>		<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
		£P.	£P.	£P.	£P.	£P.
United Kingdom	...	1,518,147	1,706	34,375	5,268	1,559,496
Rest of Empire	...	25,612	—	35,001	—	60,613
<i>Total Empire</i>	...	<u>1,543,759</u>	<u>1,706</u>	<u>69,376</u>	<u>5,268</u>	<u>1,620,109</u>
Germany	...	365,727	5,384	2,638	—	373,749
Syria	...	84,769	16,570	111,459	184	212,982
Egypt	...	14,516	547	54,780	2,119	71,962
Roumania	...	38,239	56	2,325	—	40,620
France	...	17,417	1,116	3,389	—	21,922
United States of America	...	4,795	73	16,547	—	21,415
Other foreign countries	...	176,817	6,463	45,578	—	228,858
<i>Total foreign countries</i>	...	<u>702,280</u>	<u>30,209</u>	<u>236,716</u>	<u>2,303</u>	<u>971,508</u>
GRAND TOTAL	...	<u>£P.2,246,039</u>	<u>£P.31,915</u>	<u>£P.306,092</u>	<u>£P.7,571</u>	<u>£P.2,591,617</u>

In addition there were exports of bullion and specie to the value of £P.841,878.

(iii) *Principal Domestic Exports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of destination with amounts</i>
			£P.	in £P.'000.
	<i>Fresh Fruit—</i>			
	Oranges, in cases	4,199,915 cases	1,949,177	United Kingdom (1,406), Germany (346), Holland (39), Roumania (35), Denmark (34), Sweden (21), Norway (12), Canada (10).
	Oranges, in bulk	327 tons	3,066	Syria (3).
	Grapefruit	250,826 cases	129,184	United Kingdom (96), Germany (11), France (4), Norway (4).
	Water Melons and Melons...	6,802 tons	20,643	Syria (all).
	Other kinds		11,980	United Kingdom (3), Roumania (2), Egypt (2).
			<u>2,114,050</u>	
	<i>Edible oils—</i>			
	Sun-flower oil	306 cwt.	612	Syria (all).
	Olive oil	5,966 cwt.	20,786	Syria (4), Poland (3), Roumania (2), Union of South Africa (2), United Kingdom (2).
	Other kinds	13,930 cwt.	26,459	Syria (26).
		<u>20,202 cwt.</u>	<u>47,857</u>	
	Wines	207,516 gal.	22,270	Egypt (6), United Kingdom (5), United States of America (2), Syria (2), Germany (2).
<i>Class III.</i>				
	Soap (all kinds)	2,768 tons	79,342	Egypt (38), Syria (36).
	Apparel all kinds	—	38,543	Syria (28), Egypt (5).
	Artificial teeth	—	23,674	United Kingdom (5), Sweden (3), Australia (2), Canada (2).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
		£P.	£P.	£P.	£P.
1929	...	1,011,405	122,376	6,045,122	7,178,903
1930	...	1,163,943	119,481	5,705,063	6,988,487
1931	...	998,505	158,866	4,784,654	5,942,025
1932	...	1,535,810	217,505	6,171,106	7,924,421
1933	...	1,950,571	455,531	8,862,693	11,268,795

* £P.1=£1 sterling.

(ii) Imports by Classes, 1933.

From	Class I. £P.	Class II. £P.	Class III. £P.	Class IV. £P.	Total Merchandise. £P.
United Kingdom	135,381	51,604	1,045,598	717,353	1,949,936
India and Burma	31,014	108,789	23,459	4,286	167,548
Australia and New Zealand ...	137,394	65	82	184	137,725
Cyprus	60,175	1,688	4,019	20,406	86,288
Rest of Empire	29,069	23,509	7,158	790	60,526
<i>Total Empire</i>	<i>393,033</i>	<i>185,655</i>	<i>1,080,316</i>	<i>743,019</i>	<i>2,402,023</i>
Egypt	498,425	71,845	188,292	449,665	1,208,227
Germany	18,667	8,418	921,603	244,615	1,193,303
Syria	498,061	25,759	328,787	90,056	942,663
United States of America... ..	92,649	11,363	518,061	216,711	838,774
Roumania	36,642	201,136	337,808	6,049	581,635
France	26,958	4,518	245,613	182,486	459,575
Turkey	313,253	23,641	12,343	14,819	364,056
Italy	42,925	7,425	302,441	4,231	357,022
Japan	2,546	1,280	346,010	23	349,859
Belgium	25,754	8,501	299,465	13,020	346,740
Czechoslovakia	14,868	662	292,809	4,604	312,943
Poland	12,031	33,511	156,397	87,779	289,718
Other foreign countries	450,548	252,797	712,800	60,806	1,476,951
<i>Total foreign countries</i>	<i>2,033,327</i>	<i>650,856</i>	<i>4,662,419</i>	<i>1,374,864</i>	<i>8,721,466</i>
GRAND TOTAL	£P.2,426,360	£P.836,511	£P.5,742,735	£P.2,117,883	£P.11,123,489

In addition there were imports of bullion and specie to the value of £P.145,306.

(iii) Principal Imports, 1933.

Article.	Quantity.	Total Value. £P.	Principal Countries of consignment with amounts in £P.'000.
<i>Class I.</i>			
Grain, Flour, Pulse, etc.—			
Wheat	59,086 tons	448,236	Syria (173), Turkey (122), Australia (42), Russia (40), Egypt (28), Iraq (17).
Wheat flour	26,488 „	264,679	Australia (66), Egypt (65), Syria (62), United States of America (56).
Rice	15,461 „	132,238	Egypt (106), India (18).
Barley	24,437 „	106,788	Turkey (67), Syria (13), Egypt (13).
Durrah and Maize	12,300 „	66,782	Syria (34), Egypt (12).
Beans	6,114 „	38,777	Syria (19), Egypt (8), Roumania (5).
Other pulse	3,005 „	23,794	Syria (20).
Other grain and flour	3,660 „	26,924	Poland (7), France (4), Belgium (2), Turkey (2).
	150,551 „	1,108,218	
Animals, living, for food—			
Cattle	8,796	90,141	Bulgaria (45), Cyprus (26), Roumania (11).
Sheep and lambs	61,129	47,079	Turkey (45).
Goats and kids	53,155	27,189	Turkey (27).
Poultry, alive	280,236	17,179	Syria (17).
Other kinds	114	28	
		181,616	
Sugar and candy-sugar	15,810 tons	141,865	Egypt (52), United Kingdom (32), Dutch East Indies (31), Czechoslovakia (14).
Fish (all kinds)	2,906 „	98,968	Egypt (33), United Kingdom (11), Syria (11), Portugal (10).
<i>Class II.</i>			
Wood and timber, unmanufactured	—	297,272	Roumania (165), Russia (42), Poland (32). Sweden (13), Latvia (12).
Groundnuts	7,694 tons	103,186	India (93), China (10).
<i>Class III.</i>			
Iron and Steel Manufactures—			
Tubes, pipes, etc.	11,786 „	214,958	Czechoslovakia (81), Poland (46), Germany (29), United Kingdom (26), Japan (14).
Bars, angles and rods	31,301 „	174,319	Belgium (61), Germany (33), France (30).
Girders... ..	13,016 „	65,777	Belgium (29), France (20), Germany (10).
Other kinds	—	274,640	Germany (79), Belgium (64), United Kingdom (31), Austria (17), Sweden (12).
		729,694	

(iii) *Principal Imports, 1933—contd.*

<i>Class III—contd.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total Value. £P.</i>	<i>Principal Countries of consignment with amounts in £P'000.</i>
Cotton Manufactures—				
Piece goods—				
	Bleached	—	69,852	United Kingdom (32), Japan (20), Italy (9).
	Grey... ..	—	57,684	Japan (52), United Kingdom (4)
	Dyed and printed	—	283,036	Japan (9), United Kingdom (61), Italy (53), Syria (23), Germany (11), Czechoslovakia (11).
	Yarn	—	68,600	Italy (31), United Kingdom (15), India (13).
	Thread... ..	—	22,736	United Kingdom (9), France (7), Belgium (3), Switzerland (3).
	Other	—	68,999	United Kingdom (13), Japan (12), Germany (10), Czechoslovakia (7), Italy (6), Poland (5), Syria (4).
			570,907	
Motor cars, etc., and parts—				
	Motor cars	1,969	370,879	United States of America (234), United Kingdom (61), Sweden (35), Germany (16), Egypt (11).
	Motor cycles	469	19,734	United Kingdom (17).
	Parts	—	54,466	United States of America (23), United King- dom (10), Egypt (5).
	Tractors and parts	—	45,308	United States of America (43).
	Tyres and Tubes	—	66,091	United States of America (33), Italy (10), France (7), United Kingdom (6), Syria (5).
			556,478	
Machinery—				
	Engine Motors	—	78,266	United Kingdom (53), Germany (22).
	Electric Motors, Generators, etc.	—	59,395	United Kingdom (36), Germany (11).
	Pumping	—	37,932	United States of America (13), United Kingdom (11), Germany (6).
	Textile... ..	—	22,407	United States of America (11).
	Wood Working	—	22,581	Germany (17).
	Other	—	312,382	Germany (135), United Kingdom (93), United States of America (30), Austria (14).
			532,963	
	Apparel	—	407,644	Syria (106), United Kingdom (62), Germany (61), Czechoslovakia (40), Japan (40), Italy (22), Austria (19), Egypt (14).
Oils—				
	Benzine in tins	39,663 tins	7,059	Egypt (6), Syria (1).
	Benzine in bulk, etc....	5,973,803 gal.	170,349	Roumania (146), Russia (17), Egypt (6).
	Kerosene in tins	345 tins	20	
	Kerosene in bulk, etc. ...	9,256,985 gal.	115,543	Roumania (83), Russia (21), Persia (6).
	Lubricating	2,399 tons	48,889	Egypt (14), United States of America (10), United Kingdom (9), Belgium (7).
			341,860	
	Silk Manufactures	—	280,747	Japan (89), Syria (69), Italy (26), France (21), Germany (19), United Kingdom (16), Egypt (9).
	Woollen Manufactures	—	255,869	United Kingdom (113), Italy (54), France (29), Syria (15), Czechoslovakia (13), Germany (13), Poland (7).
Wood and Timber Manufactures—				
	For citrus fruit cases... ..	41,553 cub. ft.	145,097	Roumania (93), Poland (20), Yugoslavia (13), Russia (11).
	Other kinds	—	95,547	Poland (26), Italy (12), Syria (11), Germany (8), United States of America (5).
			240,644	
Paper and Cardboard Manufac- tures—				
	Packing	3,606 tons	59,003	Sweden (23), Czechoslovakia (16), Germany (7).
	Printing	2,060 "	34,754	Austria (17), Czechoslovakia (5).
	Cardboard	1,309 "	14,907	Sweden (4), Austria (4), Finland (3).
	Other kinds	—	38,497	Austria (8), Germany (6), France (6), Italy (3).
			147,161	
	Electrical goods and apparatus	—	144,865	Germany (49), United Kingdom (39), Holland (17), United States of America (11), Belgium (5), Austria (5).
Class V.				
	Gold coins	—	145,015	Egypt (108), Germany 11), Holland (7), France (3).

V.—Natural Resources.

A.

1. AGRICULTURE.

Agriculture is the principal occupation, and a variety of crops is grown. The principal are as follows:—

Cereals.

These are grown primarily for local consumption. There are some exports, but the exports of wheat and barley are usually exceeded by imports. A large part of the production of sesame is exported either as seed or as oil. Wheat and barley are grown as winter crops and durrah and sesame as summer crops. Production during recent years has been estimated as follows:—

			1930.	1931.	1932.	1933.
					<i>Metric tons.</i>	
Wheat	...	...	87,339	79,650	51,073	44,447
Barley	...	...	60,071	41,200	24,300	33,926
Durrah	...	...	37,058	16,862	15,452	8,860
Sesame	...	...	2,365	2,024	449	214

There is, however, some ground for supposing that the actual yields are some 20 per cent. greater than the figures recorded above. The reduction during recent years has been due chiefly to unfavourable climatic conditions, and deficient rainfall.

Fruits.

Oranges are the most important fruit crop and the principal export of Palestine. Reliable statistics of production are not available but the following are figures of exports by seasons (starting 1st November):—

	<i>Boxes.</i>	<i>Value.</i> £P.		<i>Boxes.</i>	<i>Value.</i> £P.		<i>Boxes.</i>	<i>Value.</i> £P.
1929-1930	2,861,341	854,546	1931-1932	3,620,889	1,735,831	1933-4	5,097,351	1,911,506
1930-1931	2,421,005	726,954	1932-1933	4,209,561	1,683,825			

Grapefruit are of growing importance, but are still of little significance compared to oranges. Exports during the 1933-34 season were valued at £P.173,478.

The exports of citrus fruit for the season 1934-35 are estimated at 7,000,000 boxes. The area under cultivation at the end of 1933 was approximately 220,000 dunums (50,000 acres): of this area some 110,000 dunums (25,000 acres) were in bearing.

The following are the principal markets to which citrus fruit is exported:—

			<i>Season 1932-3.</i> <i>Cases.</i>		<i>Season 1933-4.</i> <i>Cases.</i>
United Kingdom	...	...	3,191,348	...	3,498,570
Germany	...	...	807,928	...	1,273,226
Holland	...	...	102,434	...	138,433
Rumania	...	...	79,189	...	108,207

The total area suitable for citrus cultivation is put at 300,000 to 350,000 dunums (69,000 to 80,000 acres) and the potential export of citrus fruit from Palestine in 1950 is estimated by competent authorities as between 30,000,000 and 35,000,000 cases.

As a result of the introduction of a Fruit Inspection Service, the packing and grading of citrus fruits have been much improved in recent years. An advertising campaign has been undertaken in the United Kingdom and on the Continent, financed by an export tax of 2 mils per case.

Other citrus fruits, lemons, and citrons are of little importance.

Olive.—Production varies considerably and in the last three years has been estimated as: 1931, 33,906 tons; 1932, 6,559 tons; and 1933, 3,599 tons. The crop is produced mainly for local consumption as fruit or for crushing in the local oil factories. The average annual production of olive oil is believed to be over 5,000 tons, and steps are about to be taken to improve this oil for export abroad as edible refined or crude olive oil, in view of the decline in the local demand for olive oil for soap making.

Melons are produced both for the local market and for export, principally to Syria. Exports have been as follows:—

	<i>Metric tons.</i>	£		<i>Metric tons.</i>	£
1930	35,616	83,625	1932	10,979	30,794
1931	15,928	47,720	1933	6,802	20,643

Grapes.—The greater part of the crop is wine grapes, but there is some production of table grapes, both for the local market and for export to neighbouring countries, principally Egypt. Production in 1933 was estimated at 12,148 metric tons, and 359 tons valued at £P.2,538 were exported as fruit in 1933. Exports of wine in 1933 were 943,253 litres valued at £P.22,270.

Figs are produced almost exclusively for local consumption. Production in 1933 was estimated at 4,585 metric tons.

Almonds are produced both for the local market and for export. Exports have been:—

	<i>Metric tons.</i>	<i>Value.</i> £P.		<i>Metric tons.</i>	<i>Value.</i> £P.
1930	888	27,670	1932	594	20,357
1931	537	20,272	1933	213	5,685

Other fruits.—Many other varieties are grown. Others exported include bananas, apricots, and carobs. The cultivation of carobs is being specially encouraged by Government.

Legumes.—Lentils, beans, peas and Kersenneh are grown, mainly for local consumption. There are both exports and imports of all these but the net exports are not of great importance. Production in recent years has been :—

				<i>Metric tons.</i>			
				1930.	1931.	1932.	1933.
Lentils	...	...	...	3,800	3,758	1,606	1,547
Beans	...	...	...	3,384	3,670	768	655
Peas	...	...	...	1,288	1,064	1,411	3,373
Kersenneh	...	...	...	7,612	8,030	2,077	1,892

Potatoes.—The following are the areas and yields of potato cultivation during the last three years :—

				<i>Dunums.</i>	<i>Metric tons.</i>
1932	...	...	...	2,445	854
1933	...	...	...	2,806	931
1934	...	...	...	5,394	2,132

This crop is being specially fostered by Government.

Vegetables.—Various green vegetables are grown for local consumption. There is no important export.

Tobacco.—In 1933 the production was 420,584 kilos of which 96 per cent. was of Turkish type. Much of the greatest part was used locally, only 306 kilos of uncut tobacco being exported. On balance Palestine is an importer, net imports of tobacco in 1933 being valued at £P.56,369.

General.—Wheat and barley are grown by all farming communities, including peasant proprietors, medium sized farmers, and agricultural co-operative organizations and settlements, in all districts. Wheat is the more important crop but in the Beersheba and Gaza districts the area under barley predominates.

Beans are mainly grown in the coastal plain and plateaux of the northern area and are seldom seen south of Jerusalem or Jaffa.

The cultivation of other legumes such as lentils and vetch is not extensive in the southern plains. They are grown mainly in the hill districts.

Wheat, and to a smaller extent, barley, are almost annually attacked by *Scythis temperatella* (*ad-dūd* "the worm"). Every endeavour is made by the Department of Agriculture to help farmers to eradicate this pest.

Bunt (*Tilletia tritici*) and loose Smut (*Ustilago tritici*) also occur but are not serious. Farmers are supplied with suitable fungicides to control these pests.

Rust (*Puccinia Graminis*) also occurs but has not caused much damage. At Agricultural Experimental Stations, efforts are being made to select rust-resistant varieties.

Smut on barley (*Ustilago zea*) occurs annually, and farmers usually treat their seed suitably prior to sowing.

In regard to breeding and research work, the Department of Agriculture devotes considerable attention to the improvement of local strains of cereals at its experimental stations. Small samples of proved varieties are issued free of charge for propagation. The demand for such varieties has invariably exceeded the supply.

Imported grains are tested out and acclimatized. Experiments are being made to establish imported grasses and improve natural pastures. Numerous plots have been established throughout the country to demonstrate the best varieties of crops, the best methods of cultivation and the most satisfactory crop rotation.

The Department of Agriculture also carries out extensive propaganda to encourage farmers to grow fodder crops and make hay or silage for the feeding of their animals in times of drought and during the months when natural grazing is not available.

2.—FORESTS.

Two hundred and thirty-four areas of forest reserve, with a total area of about 173,442 acres, had been proclaimed at the end of 1933.

Most of the forest land is confined to hill areas of the north and the central plateau, but there are substantial areas of privately-owned eucalyptus and other plantations on the coastal and other plains.

A programme of afforestation is being carried out by the Government; arrangements have been made to provide additional technical staff and to increase progressively the annual votes so as to accelerate and increase the process. The area planted by Government up to the end of 1933 was 3,832 acres of which 1,020 acres were replanted or newly planted during 1933. Eleven official forest nurseries produced 1½ million plants of which approximately 1 million were planted in Government plantations and ½ million were issued gratis or sold to the public. The grafting of wild carob trees in forest reserves was started in 1933 as well as the propagation of carob plants on a large scale at nurseries for eventual budding and distribution to the public. Trials with a large number of exotic species were continued as well as experimental operations including work on soil erosion, reclamation of sand dunes, and silvicultural investigations. Some Government plantations have already reached the productive stage. Exploitation generally in forest reserves is at present carried out by villagers who extract small timber, firewood, and charcoal, under licence for domestic and trade purposes. The area planted by private agencies to the end of 1933 was 7,492 acres of which 414 acres were planted during 1933.

Natural forests are habitually grazed, subject to some limitation, by village herds and flocks. Formerly there were large sized trees, particularly *Quercus aegilops*, but these were cut down during the Great War, and the forests now have the general appearance of coppice growth with numerous blanks. The principal species are *Quercus aegilops*, *lusitanica*, and *coccifera*, *Styrax officinalis*, *Phillyria media*, *Arbutus* spp. *Pistachia*, and *Cercis siliquastrum*, with wild olives and carobs. Natural forests play an important role in preventing soil-erosion and in conserving the rainfall but it will be many years before they produce timber trees of sufficient size for milling. There is little prospect of an export trade in timber, but there are possibilities of exporting charcoal and other minor products.

Production of firewood in 1933 was 8,617 tons and charcoal 3,728 tons. Timber is not measured in terms of volume and is mostly small timber for roofing, ploughs, tools, fencing, fruit-tree supports, etc.; 36,803 pieces of timber were cut in 1933. Imports of timber and forest produce are large and are increasing annually particularly for fruit boxes and for constructional purposes. Total imports of timber and forest products in 1933 were valued at £P.732,199.

3.—ANIMAL HUSBANDRY.

A census of live-stock taken in 1934 showed the following results:—

Horses	15,600	Cattle	131,000
Mules	7,000	Buffaloes	4,500
Donkeys	75,000	Sheep	188,000
Camels	32,000	Goats	380,000

It is considered, however, that there are more animals in the country than the statement shows, as owners are reluctant to give full information owing to fears of additional taxation.

Of the *cattle*, about 14,000 are high grade dairy cows, the majority of which are to be found in Jewish settlements. The remainder, kept in villages, are used for ploughing purposes. Fattening of cattle for meat is not practised owing to the scarcity of grazing and high costs of feeding.

Wool is of the carpet variety and the average yield is about two kilograms per animal. The average annual wool crop is estimated at 400 to 500 tons, the whole of which is absorbed by local industry.

The Government maintains a stock-breeding service for improving local strains of horses, donkeys, cattle, sheep, and goats.

The 1934 census showed a total of 1,500,000 *poultry* (believed to be under-estimated for the reasons stated above). Egg production, which is estimated at 80,000,000 annually, is not at present sufficient to met local demands and as many as 34,000,000 eggs were imported during 1933.

The local *rabbit* industry is in its infancy and rabbits are mostly kept for their meat. Fur- and wool-producing breeds have been introduced by the Department of Agriculture and are being distributed to local rabbit keepers.

A Central Government Poultry, Beekeeping, and Rabbit Station is maintained at Acre for demonstration and breeding purposes and for the selection, acclimatization, and distribution of imported varieties.

4.—MINERALS.

The following mineral resources are known to exist:—

The minerals in solution in the waters of the Dead Sea are **potassium chloride**, **magnesium bromide**, **magnesium chloride**, etc. The quantities are practically unlimited. These are being worked under concession. The production of potash and bromine in 1933 was 10,000 tons and 300 tons respectively.

Potassium chloride is first separated as **carnallite** by solar evaporation. The double salt thus obtained is then decomposed in a special plant which can produce a potash varying in quality from 60 to 95 per cent. potassium chloride. The bromine is extracted from the residual liquor by treatment with chlorine.

Sulphur.—A deposit of sulphur exists seven kilometres south of Gaza, covering an area of one square kilometre. The average quality of the ore is about 20 per cent. sulphur in a gangue of quartz sand. The ore is to be worked on the open cast system and will then be concentrated by the flotation method. A plant has been installed capable of treating 30,000 tons of ore per annum. The trial runs show that a quality of 95 to 98 per cent. sulphur can be obtained.

Salt.—The salt mountain of Jebel Usdum contains unlimited quantities of pure salt. A certain amount is being mined since 1927 for the supply of the Jerusalem market. This market is now mainly supplied from the product of the Dead Sea Concession, consequently the production from Jebel Usdum has decreased and was only 878 tons in 1933.

Phosphate and Bituminous Limestone.—Deposits of phosphate over a superficial area of 100 square kilometres and deposits of bituminous limestone over an area of 10 square kilometres are known to exist in the Nabi Musa district. Thirty-two prospecting licences were in force in 1933. There is no commercial production at present.

As the phosphate ore is variable in quality, the licensees have so far confined their efforts to evolving methods for concentration of the pure ore. The only utility of the bituminous limestone appears to be for the manufacture of quick lime. There is more than sufficient combustible matter for the burning of lime and a portion of the oils could theoretically be obtained as a by-product.

Gypsum.—The deposits near Menahemiya are now worked under quarry licences.

Manganese.—The ore occurs in irregular beds in sandstone near the Gulf of Akaba.

Copper.—The mineral is widespread near the Gulf of Akaba and is found also in veins together with barytes and galena.

Petroleum has not yet been proved to exist in payable quantities, but a good deal of prospecting has been carried out in the coastal plain and south of the Dead Sea.

5.—FISHERIES.

There is a small fishing industry which caters almost entirely for the home market. About 400 small fishing boats and 700 fishermen are engaged in it.

The following are estimates of the annual catches of fish at the chief fishing centres:—

					Quantity in tons.	Estimated value (first selling prices). £P.
1927-28	...	...	...	...	488	30,778
1928-29	...	...	...	...	731	38,774
1929-30	...	...	...	...	951	46,102
1930-31	...	...	...	...	1,045	45,655
1931-32	...	...	...	...	information not available	
1933	...	...	...	...	1,560	52,763

The exports of fresh or frozen fish are negligible averaging something less than 1,000 cwt. valued at something less than £P.800 annually. Practically the whole goes to Syria.

There are considerable imports of fish, the value in 1933 being about £P.46,000 of fresh and frozen fish, £P.27,000 of tinned fish, £P.26,000 of dry salted and smoked fish, and fish in brine.

6.—MISCELLANEOUS.

About 150 tons of *honey* were produced during the 1933 season. The honey is mainly disposed of locally, but a scheme is in hand for the establishment of honey standards to facilitate export, when a larger quantity is available.

B.

FOOD SUPPLY.

From the quantities of foodstuffs imported it will be apparent that the country cannot satisfy the demands of the home market. All commodities of first necessity are imported in sufficiently large quantities to supplement whatever local production may exist or to satisfy the demand for staple commodities which are not produced in Palestine such as rice, sugar, coffee, etc. Owing to the high rate of immigration from Europe, the demand for foodstuffs is steadily increasing notwithstanding the fact that production is measurably and rapidly expanding in respect of many articles of food such as dairy products, and vegetables, as well as certain manufactured foodstuffs such as preserves and biscuits.

In view of the flow of immigration it is not likely that Palestine will in the near future be able to produce the full requirements of its consumers, but it may confidently be assumed that production in the various fields of agriculture and industry will develop extensively.

VI.—Industry.

Palestine is essentially an agricultural country producing cereals, citrus fruit, olives, grapes, water-melons, and tobacco in sufficient quantities to meet in most cases the local demand and to supply an increasing export trade. During the last decade, however, there has grown up beside this primary production a manufacturing industry of substantial dimensions.

It is estimated that the total capital now invested in industry in Palestine exceeds £P.7,000,000; the value of the total annual output of manufactured goods is estimated at nearly £P.6,000,000; and the average number of hands employed in the actual processes of manufacture of these goods is about 30,000 in something over 5,000 factories and workshops.

As these figures indicate, apart from a few large concerns, the various industries are carried on in very small units.

Generally speaking, the principal industries are those using local products and raw materials.

The following is a list of the principal industries:—

Soap.—Factories 35; approximate output 1933 7,000 tons (2,813 tons value £P.79,342, exported).

Cement.—Factory 1; approximate output 1933 135,000 tons (6,393 tons value £P.14,063, exported).

Wine.—Presses and distilleries 33; output 1933 wine 1,629,125 litres; brandy 121,292 litres; arak 38,307 litres; other spirits 686,989 litres.

Tobacco.—Factories 13; output 1933 cigarettes 537,348 kilos.; cut tobacco 17,666 kilos.; tobacc 71,930 kilos.; snuff 6,310 kilos.

Olive oil.—Modern refineries 3; primitive oil-presses 550; output entirely dependent on the crop and fluctuating between 1,000 and 7,000 tons (export 1933 303 tons).

Salt.—Factories 2; output 1933 8,404 tons.

Smaller undertakings produce a very wide range of articles from wholly or partly imported raw materials chiefly to meet local demand. These articles include hosiery, silks, wearing apparel, alimentary products (biscuits, macaroni, chocolate, jam), furniture, household requisites, mirrors, matches, fancy leather goods, shoes, artificial teeth, etc.

Cheap electric power is available from the hydro-electrical station of the Palestine Electric Corporation at Jisr Mejame on the Jordan and from the fuel station of the Jerusalem Electric and Public Services Corporation in Jerusalem and most of the local factories and workshops use this current. Manufacture by machinery is steadily increasing.

The price of land and rents of houses and buildings in urban areas is high but industrial activity continues to increase in spite of this factor.

Compared to the production for the home market production for export is relatively unimportant.

Of manufactured foodstuffs exports of wine amount to about 200,000 to 300,000 gallons annually, approximately one-third of the total output, and exports of edible olive oil to a small proportion of the total output. (On balance, as pointed out above, Palestine is an importer of olive oil.)

Of other manufactured goods the value of domestic exports in 1933 amounted to a little over £P.300,000, something under one-fifteenth of the annual value of the total output of the factories and workshops.

The principal export is soap, nearly half the total production of which is exported. The only important markets are Syria and Egypt, and of these the latter has been of rapidly diminishing importance since the imposition of heavy protective duties on soap four years ago. The value of exports in 1933 was £P.79,342 compared with £P.108,101 in 1932.

The next most important export is hosiery, about one-fourth of the total production being exported, mostly to neighbouring countries.

Owing to the Palestine-Syria Customs Agreement by which the manufactures and products of the one country are admitted free of import duty to the other, a good percentage of Palestine manufactures is exported to Syria.

Mention should be made of the building activity due to the arrival of large numbers of new settlers and the shortage of housing accommodation. This has caused a marked increase in rents and land values and has provided employment for large numbers of both skilled and unskilled workers in the building trade. It is estimated that investments in new buildings amounted to approximately £P.3,000,000 in 1932 and £P.5,800,000 in 1933.

The motor transport industry has in recent years assumed a large importance as a means of livelihood; and the number of wage-earners now engaged in it (excluding the industries of body-building and repairs) is probably in the neighbourhood of 6,000.

VII.—Other Economic Activities.

Entrepôt Trade.—Historically Palestine has at various times been of great importance as a highway for trade between, e.g., Egypt and Mesopotamia, and Syria and Arabia; and it still does a certain amount of entrepôt trade. Almost all the trade of Trans-Jordan and also some trade to and from neighbouring parts of Syria and (to a small extent) Iraq passes through Palestine in transit.

Important new developments are the construction of the new pipe-line from the Mosul oil-fields by the Iraq Petroleum Company, one branch of which ends at Haifa; and the new Haifa harbour works. The opening of the new harbour at Haifa has resulted in some increase in the entrepôt trade of Palestine and has greatly increased commercial activity in Haifa town in particular.

Re-exports are valued at about £P.250,000 annually, of which about half go to Egypt. The value of the transit trade is about £P.200,000 of which rather over a half comes from Trans-Jordan.

Pilgrim and Tourist Traffic.—Palestine attracts every year a large number of visitors to the Holy Places and other places of historic interest as well as tourists who find the climate, particularly in winter and spring, agreeable, and Jews interested in the activity associated with the establishment of a Jewish National Home. 79,833 travellers (including tourists, pilgrims and travellers in transit) entered the country in 1933. There is a Tourist Development Association in Palestine, organized by tourist agents, of which the General Manager, Palestine Railways, is a member; and the Jewish Agency maintains an Information Bureau for visitors. A mixed Committee set up by the Government has recently made recommendations for giving further publicity to the attractions of Palestine as a tourist resort. Much useful work in this sphere is done by the Levant Fair Company.

VIII.—Communications.

(i) INTERNAL COMMUNICATIONS.

Railways.—There are two railways in Palestine, both operated by the Government.

1. *Palestine Railway* (4 ft. 8½ in. gauge).—326 kilometres long. The main routes are Haifa-Rafa (238 kilometres) and the branch Jaffa-Jerusalem (87 kilometres). It connects with the Hejaz Railway at Haifa and Tulkarm and the Sinai Railway at Rafa, and thus provides a link in the railway connexion between Istanbul and Egypt.

2. *Hejaz Railway* (1.05 metres gauge).—Constructed by the Turkish Government, the part lying within Palestine and Trans-Jordan, 467 kilometres in length, is now worked by the Palestine Government. The parts of the railway within Palestine itself are from Samakh to Haifa, with extension to Nablus, and from Haifa to Acre.

Roads.—There is a fairly extensive network of roads, the total length being 1,015 kilometres motorable in all seasons and 1,600 kilometres motorable in the dry season only.

Motor Transport.—The country is served by comfortable motor services running regularly and at short intervals between the various towns and the principal villages; and motor 'buses connect the various quarters and suburbs of Jerusalem, Jaffa-Tel-Aviv, and Haifa.

There is a regular weekly over-land motor service between Jerusalem and Baghdad (via Amman) and thence to Persia. Another overland motor service connects Haifa with Baghdad via Damascus. There are also regular services between Haifa and Beirut and between Jerusalem and Amman.

All these services are privately owned, but the Palestine Railways has introduced combined road and rail tickets for the journeys between Haifa-Beirut, Ras el-Ain-Jaffa and Lydda-Jerusalem.

(ii) EXTERNAL COMMUNICATIONS.

Land.—Railway and motor transport communications with Egypt, Turkey, Syria, 'Iraq, and Arabia have been referred to above.

Sea.—In addition to frequent occasional services the following lines provide regular services to and from Palestine:

<i>Lines.</i>	<i>Destinations.</i>	<i>Cargo or Passengers.</i>	<i>Frequency of Calls.</i>
Khedivial Mail Line ...	Egypt, Syrian Coast, and Cyprus ...	Cargo	Weekly.
Prince Line ...	United Kingdom, Egypt, Syrian Coast, Cyprus ...	Cargo	Fortnightly.
Moss Line ...	United Kingdom, Egypt, Syrian Coast, Cyprus ...	Cargo	Fortnightly.
Byron Line ...	Greece, Egypt, Syrian Coast, and Antwerp ...	Cargo	Fortnightly.
Messageries Maritimes ...	Marseilles, Egypt, and Syrian Coast ...	Passenger and Cargo.	Weekly.
Servizi Maritime ...	Italy, Egypt, and Syrian Coast ...	Passenger and Cargo.	Weekly.
Ellerman Line ...	United Kingdom, Syrian Coast, and Egypt ...	Cargo	Monthly.
American Export Line...	United States of America, Egypt, and Syrian Coast	Cargo	Weekly.
Deutsch Levant Line ...	Germany, Egypt, and Syrian Coast ...	Cargo	Monthly.
Deutsch Orient Line ...	Germany, Egypt, and Syrian Coast ...	Cargo	Monthly.
Lloyd Triestino ...	Italy, Egypt, Syrian Coast, and Cyprus ...	Passenger and Cargo.	Weekly.
Servi. Marit. Roumania...	Roumania and Istanbul ...	Passenger and Cargo.	Monthly.
Armement L. Dens & Co.	Belgium, Egypt, and Syrian Coast ...	Cargo	Monthly.

The principal ports are Haifa and Jaffa.

Jaffa is an open roadstead with quays for lighters and small vessels. Work is at present in hand for its improvement by the provision of new transit sheds, a breakwater and a lighter basin.

A new harbour was completed at Haifa in 1933 providing a sheltered area of deep water of about 300 acres behind two breakwaters of a mile-and-a-half and half-a-mile respectively in length. There are 700 yards of quay space giving accommodation for three or four large steamers at once and an oil dock is being provided which will accommodate two vessels. There is a submarine pipeline for the loading of oil which projects into the bay to the north of the lee breakwater. Further additions and improvements are contemplated to equipment for handling cargo.

Minor ports are Acre, which is used little except by sailing vessels; and Gaza, which is an open roadstead with a short length of jetty but without quays, and is rarely used by large vessels.

The following table shows the shipping entered at Palestine ports in 1933:—

Foreign Trade.

<i>Port.</i>	<i>Sailing Vessels.</i>		<i>Steam Vessels.</i>		<i>Total.</i>	
	<i>Number.</i>	<i>Tons.</i>	<i>Number.</i>	<i>Tons.</i>	<i>Number.</i>	<i>Tons.</i>
Jaffa ...	1,012	37,169	691	1,683,608	1,703	1,720,777
Haifa ...	952	30,768	619	1,539,968	1,571	1,570,736
Acre ...	78	859	1	183	79	1,042
Gaza ...	18	879	1	200	19	1,079
Total ...	2,060	69,675	1,312	3,223,959	3,372	3,293,634

Coasting Trade.

Total ...	270	10,717	619	1,499,246	889	1,509,963
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The following table shows the nationality of this shipping:—

<i>Country of Registration.</i>	<i>Sailing Vessels.</i>		<i>Steam Vessels.</i>	
	<i>Number.</i>	<i>Tons.</i>	<i>Number.</i>	<i>Tons.</i>
British ...	—	—	358	646,608
Italy ...	26	1,161	272	962,019
France ...	—	—	96	584,533
Germany ...	1	2	79	171,935
United States of America ...	—	—	31	168,646
Roumania...	—	—	66	131,482
Greece ...	1	57	100	130,639
Other ...	2,032	68,455	310	428,097
Total ...	2,060	69,675	1,312	3,223,959

Air Services.—Imperial Airways have an aerodrome at Gaza which is used in connexion with the air-mail services to and from Great Britain, 'Iraq and India. This aerodrome is also used by other air services.

It is intended that the future air port of Palestine should be at Lydda (in the vicinity of Jaffa). The following regular air services serve Palestine:—

Imperial Airways.—Twice a week each way, Great Britain, Egypt, Palestine 'Iraq-India.
 Misr Airwork, Ltd.—Three times a week each way, Palestine-Egypt.
 Royal Dutch Air Service (K.L.M.).—Once a week each way, Europe-Batavia.

IX.—Tariff.

The Customs Tariff, which was at first wholly framed upon an *ad valorem* basis, has been gradually specified. Nearly 280 items accounting for about one-half of the total value of imports are now taxed on a specific basis.

Save where rates have been imposed to protect local industries, the average *ad valorem* duty is 12 per cent. to 15 per cent. There is a long list of articles which are exempt from Import Duty. The tariff is designed generally to protect local industries, to provide them with raw material duty free or at a low rate of duty, and to collect the greatest amount of revenue from those importations able to bear the charge, without unduly increasing the cost of living.

By virtue of Article 18 of the Mandate, Palestine is precluded from adopting any system of preferential tariffs, though it may conclude a special customs agreement with any State the territory of which in 1914 was wholly included in Asiatic Turkey or Arabia. Under this last provision Palestine concluded a Customs Agreement with Syria in 1929 (superseding a convention of 1921) which provides for the reciprocal grant of exemptions from import duty for the produce and manufactures of either territory, with the exception of pure alcohol, spirituous liquors, salt, matches and tobacco. An agreement on similar lines with 'Iraq is in contemplation.

X.—Trade Representatives.

Palestine has no special trade representatives abroad. There are a number of special Chambers of Commerce interested in developing trade relations between Palestine and certain foreign countries.

- (1) British Chamber of Commerce with offices at Jaffa and Haifa.
- (2) Palestine-Bulgarian Chamber of Commerce, Tel-Aviv.
- (3) Palestine-Hungarian Chamber of Commerce, Jerusalem.
- (4) Palestine-Italian Chamber of Commerce, Jerusalem.
- (5) Palestine-Poland Chamber of Commerce and Industry, Tel-Aviv.
- (6) Palestine-Roumanian Chamber of Commerce, Tel-Aviv.

His Majesty's Government in the United Kingdom maintains a British Commercial Agent at Haifa.

WEST INDIES AND AMERICA

BAHAMAS.

I.—Situation, etc.

The Colony of the Bahamas consists of an archipelago of islands, "cays," and rocks lying between latitude 20° 50' and 27° 25' N. and longitude 72° 37' and 80° 32' W. separated from Florida, to the west, by the Straits of Florida and from Cuba, to the south by the Old Bahama and Nicholas Channels. The total area of the Colony is about 4,400 square miles and there are about 700 islands, of which only 16 are inhabited, and over 2,000 rocks. The islands are, as a rule, long narrow and low-lying and the ground is rocky, but the honeycomb rock contains pockets of rich fertile soil.

The winter climate is delightful, frost is unknown, the average temperature is about 70° F., the rainfall is slight and cool breezes prevail. During the summer months the greatest heat ranges from 80° F. to 90° F. and though the islands are never unhealthy, the change in temperature throughout the 24 hours is so small that those who remain in the Colony for the whole year may find the long summer somewhat enervating.

During the year 1933, in New Providence, the maximum temperature was 88.40° F. for the month of August, the minimum being 65.31° F. for the month of February, the mean temperatures for the year being the maximum 82.95° F., minimum 72.36° F.

The rainfall for 1933 amounted to 20.63 inches, which is approximately 35.00 inches below the average, relative humidity for the year was 8.12 per cent., the prevailing wind during months April to September was south-east and during the months October to March north-east.

The islands are sometimes visited in the autumn months by disastrous hurricanes which cause a great deal of damage to crops and buildings and occasionally loss of life.

Of the total area of 2,800,160 acres, 384,765 acres have been alienated; the remainder is Crown land.

II.—Population.

The total population of the Colony was 59,828 at the census of 1931 and was estimated at 62,679 at the 31st December, 1933. The people are mostly of African or mixed descent but there is a larger proportion of whites in the Bahamas than in any other West Indian Colony. English is the only language spoken.

The following table shows the area and population of each of the principal islands of the Group:—

<i>Island.</i>	<i>Area in Sq. Miles.</i>	<i>Population at last census (1931).</i>
Abaco	776	4,233
Andros	1,600	7,071
Eleuthera and Harbour Island	166	7,527
Exuma and Cays	100	3,774
Grand Bahama	430	2,241
Inagua	560	667
Long Island	130	4,515
Fortune Island Group (including Long Cay, Acklin's and Crooked Islands)	204	3,238
New Providence	58	19,756
Cat Island	160	3,959

It will be observed that about a third of the whole population resides in New Providence, the island containing Nassau the capital of the Colony, and the centre of the tourist traffic.

III.—Finance.

A. CURRENCY AND BANKING.

1. British sterling is the legal money of account. There are Government currency notes of 4s., 10s., and £1 denominations in circulation (amounting to £110,000 on the 31st December, 1933), in addition to British subsidiary coin. United Kingdom silver coin is legal tender without limit and is the effective basis of the note issue. United States currency is also in circulation although not legal tender.

2. The only bank doing business in the Colony, apart from the Post Office Savings Bank, is the Nassau Branch of the Royal Bank of Canada. On the 30th June, 1933, the Post Office Savings Bank had 6,011 depositors and £57,312 on deposit.

B. PUBLIC FINANCE.

1. The Public Debt at 31st March, 1934, was £180,000 the whole of which was raised locally by sale of debentures.

The sinking fund at the same date stood at £38,825.

2. (A) *Analysis of Revenue (on the basis of the Estimates for the year ending 31st March, 1935).*
Self-balancing Departments.

	Revenue.	Expenditure.	Surplus (+) or Deficit (-)
	£	£	£
Post Office and Telegraph Departments	24,550	42,682	- 18,312
Board of Pilotage	9,100	3,210	+ 5,890
Electrical Department	32,125	17,543	+ 14,582
Ice Plant	6,750	8,645	- 1,895
Water and Sewerage Department	6,535	7,893	- 1,358
	79,060	79,973	- 913

Net deficit £913.

General Revenue.

	£	Percentage.
I. Customs	160,560	78·2
II. Interest	24,690	12·0
III. Licences and Internal Revenue	14,040	6·8
IV. Fees of Court, etc.	4,955	2·4
V. Miscellaneous	1,180	0·6
	205,425	100
Revenue of self-balancing Departments set-off against Expenditure	79,060	
Total	£284,485	

2 (B) *Analysis of Import Duties for 1933.*

Amount of duty collected on articles imported from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
Class I	49,992	76,295	44,787	171,074
Class II	—	121	777	898
Class III	6,667	1,927	30,896	39,490
Class IV	1	1	34	36
Parcel Post	—	—	—	5,245
Total	56,660	78,344	76,494	216,743

3. *Analysis of Expenditure (on the basis of the Estimates for the year ending 31st March, 1935).*

	£	Percentage.
I. Deficit on self-balancing Departments (see under 2(A) Revenue)	913	0·4
II. Debt Charges	12,900	6·4
III. Administration	100,318	49·6
IV. Economic Development	20,582	10·2
V. Social Services	56,328	27·8
VI. Defence	—	—
VII. Non-effective, i.e., Pensions	11,339	5·6
	202,380	100
Expenditure of self-balancing Departments set-off against Revenue	79,060	
Total	£281,440	

4. *Reserve Funds.*

The Colony has no reserve or other special funds, but on the 1st April, 1934, there was an excess of Assets over liabilities amounting to £731,915. The major assets consisted of £200,837 invested surplus funds and advances to local hotel companies amounting to £646,946. The present economic depression, with its effect on the American tourist traffic, has, however, substantially reduced the real value of the latter item. There was also a Hurricane and Fire Insurance Sinking Fund amounting to £18,000.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	37,738	2,363	223,853	263,954
1930	32,525	61,434	241,027	334,986
1931	30,669	91,586	171,445	293,700
1932	23,370	135,852	104,664	263,886
1933	23,089	66,143	90,919	180,151

(ii) Domestic Exports by Classes, 1933.						Total
To:—	Class I.	Class II.	Class III.	Class IV.		Merchandise.
	£	£	£	£		£
United Kingdom	—	21,802	1,057	—		22,859
Canada	26,236	7,266	451	—		33,953
Jamaica	753	16,783	51	—		17,587
Rest of Empire	37	2,062	43	—		2,142
<i>Total Empire</i>	27,026	47,913	1,602	—		76,541
United States of America...	1,472	18,917	1,020	—		21,409
Holland	—	17,386	—	—		17,386
France	—	10,381	—	—		10,381
Other foreign countries ...	91	19,259	—	—		19,350
<i>Total foreign countries</i> ...	1,563	65,943	1,020	—		68,526
GRAND TOTAL	28,589	113,856	2,622	—		145,067

(iii) Principal Domestic Exports, 1933.					
Class I.	Article.	Quantity.	Total Value.	Principal countries of destination with amounts	
			£	in £'000.	
	Tomatoes, raw	120,000 bushels	26,451	Canada (26).	
	Fish (all kinds)	—	1,314	United States of America (1).	
Class II.	Sponge (all kinds except refuse and clippings).	580,977 lb.	82,485	Holland (17), United Kingdom (17), United States of America (16), France (10), Germany (10).	
	Lumber	4,347,000 feet	22,724	Jamaica (16), Cuba (4).	
	Shells	—	3,781	United Kingdom (3).	

IMPORTS.

(i) Total Imports (including Bullion and Specie) from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	91,124	12,332	300,073	403,529
1930	323,259	528,333	745,558	1,597,150
1931	264,880	375,481	557,587	1,197,948
1932	228,336	239,546	434,910	902,792
1933	251,294	287,381	355,924	894,599

In addition there were imports by Parcel Post as follows:—

	£		£
1930	67,151	1932	37,559
1931	54,093	1933	35,132

(ii) Imports by Classes, 1933.						Total
From:—	Class I.	Class II.	Class III.	Class IV.		Merchandise.
	£	£	£	£		£
United Kingdom	161,238	—	90,008	48		251,294
Canada	244,940	1,918	14,700	—		261,558
Rest of Empire	23,065	336	2,410	12		25,823
<i>Total Empire</i>	429,243	2,254	107,118	60		538,675
United States of America...	89,383	19,342	150,782	428		259,935
Cuba	34,509	56	536	7		35,108
France	19,227	—	5,847	—		25,074
Japan	14	—	11,883	—		11,897
Germany	7,762	—	1,238	—		9,000
Other foreign countries ...	11,797	—	3,111	2		14,910
<i>Total foreign countries</i> ...	162,692	19,398	173,397	437		355,924
Parcel Mails (all countries)	—	—	—	35,132		35,132
GRAND TOTAL	591,935	21,652	280,515	35,629		929,731

(iii) Principal Imports, 1933.

Class I.	Article.	Quantity.	Total Value.	Principal countries of origin with amounts	
			£	in £'000.	
	Whiskey	213,697 p. gal. } 35,816 doz. qts. }	269,702	Canada (173), United Kingdom (96).	
	Flour	53,267 barrels.	46,305	Canada (43).	
	Rum	54,173 p. gal.	38,391	Cuba (34).	
Meat—	Beef and pork, pickled, etc.	4,322 cwt.	8,079	United States of America (5).	
	Fresh	2,089 „	7,830	United States of America (6).	
	Hams and Bacon	1,542 „	5,759	United States of America (4).	
	Canned	—	5,138	Argentina (3).	
	Other	—	2,509	United States of America (2).	
			29,315		

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>				<i>Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of origin with amounts</i> <i>in £'000.</i>
<i>Class I.—contd.</i>						
Gin	...	...	...	25,962 p. gal.	18,451	United Kingdom (18).
Lard	...	...	...	7,533 cwt.	15,044	United Kingdom (13).
Ale, Porter and Stout	...	...	...	55,640 gal.	14,198	Germany (7), United Kingdom (6).
Wines	...	...	...	—	13,755	France (10).
Tobacco (all kinds)	...	...	...	—	13,429	United States of America (9).
Rice	...	...	...	24,864 cwt.	13,230	India (12).
Sugar	...	...	...	24,503 „	13,070	United Kingdom (9).
Milk (all kinds)	...	...	...	—	11,314	Canada (6).
<i>Class II.</i>						
Lumber	...	...	...	1,943,000 feet	11,337	United States of America (10), Canada (1).
<i>Class III.</i>						
Cotton Manufactures—						
Piece Goods	...	...	...	640,500 yds.	12,448	United States of America (6), United Kingdom (5).
Hosiery	...	...	...	4,740 doz. prs.	1,988	United Kingdom (1).
Duck	...	...	...	—	1,612	United States of America (1).
Other	...	...	...	—	10,820	United Kingdom (5), United States of America (5).
					26,868	
Gasoline	...	...	...	566,000 gal.	17,084	United States of America (all).
Motor Cars and Trucks	...	...	...	121	9,757	United States of America (5), Canada (2), United Kingdom (2).
Do.	do.	parts of	...	—	3,560	United States of America (3).
Tyres	...	...	...	1,004	1,918	Canada (1).
					15,235	
Hardware	...	...	...	—	14,065	United States of America (9), United Kingdom (3).
Boots and Shoes—						
Rubber and canvas with rubber soles.	...	...	...	2,527 doz. prs.	2,607	Canada (1), British Malaya (1).
Other	...	...	...	—	11,279	United States of America (8).
					13,886	

V.—Natural resources.

A.

1. AGRICULTURE.

The Bahamas is almost the only Colony in the Empire in which agricultural products are of less importance than marine products in the economic life of the community.

The soil, except in small pockets, is usually shallow and overlays hard coral rock. This unquestionably presents difficulties in the way of peasant farming, but the islands have in the past been highly productive of tropical cultivation and the soil is highly fertile if properly worked. The present low level of production is due less to natural factors than to modern conditions which have attracted the peasants from the land. Another contributory factor may have been the havoc caused by the hurricanes during the four years 1926-29.

Apart from staple foods, which are at present produced in quantities insufficient to meet local demands the principal crop at the present time is **tomatoes**, the area under this crop at the end of 1933 being about 1,635 acres.

The Bahamas tomatoes are of the highest quality and until 1930 found a ready sale on the New York market where they can be placed somewhat earlier than Florida produce. The imposition of a high customs duty in that year however, coupled with competition from Cuba and Mexico, so severely hampered Bahamas produce that export to the United States has now practically ceased.

In 1931 export to Canada developed and the position of Bahamas tomatoes in the Canadian market has been greatly strengthened by the increase of the preference for Empire tomatoes to 2 cents per lb. in pursuance of the agreement between the United Kingdom and Canada concluded at Ottawa.

The variety of tomato grown in the Bahamas is the Marglobe, which ripens up firm and attains a good colour; it appears to be the type best suited to the Canadian market where it is much appreciated.

Exports of tomatoes during recent years have been as follows:—

		<i>Quantity in</i> <i>bushels.</i>	<i>Value in</i> £			<i>Quantity in</i> <i>bushels.</i>	<i>Value in</i> £
1929	...	91,000	47,759	1932	...	165,000	75,311
1930	...	169,000	89,336	1933	...	120,000	26,451
1931	...	99,000	51,502				

Other agricultural products are relatively of little importance.

Sisal was once the premier industry of the Colony but its production has now practically ceased, although in 1933 5,724 acres were still under this crop.

The high cost of labour precludes the economic operation of plantations and decorticating factories, and the salt-water-retted product has finally proved unsaleable in competition with

sisal produced under more favourable conditions. The prospects of a revival of the industry appear to be remote.

Exports during recent years have been as follows:—

	Quantity in Tons.	Value in £		Quantity in Tons.	Value in £
1929	854	15,679	1932	81	484
1930	308	5,153	1933	22	162
1931	21	244			

Citrus fruit was exported in considerable quantities down to the beginning of the present century, but the industry then met with keen competition from Florida and was finally ruined by infestation by the blue-grey fly pest and by hurricanes. Efforts have been made during recent years to restore the cultivation and it is once more receiving attention, although the total area under citrus had dropped to about 253 acres in 1933. Parasites to control the blue-grey fly pest have been introduced from Porto Rico and seem to have become established. This pest is consequently being brought gradually under control. No record is available of the production of citrus fruits in recent years but ever increasing quantities are being grown and it is expected that in a short time there will be more than sufficient to supply the local market. The soil is suitable for grapefruit, oranges, lemons, and other citrus fruit.

Exports during recent years have been of negligible importance.

In 1933 about 53 acres were under *onions*. Conditions for this crop are suitable and there is little doubt that more could be done in the growing of this crop for the Canadian market. During 1934 an abundant crop of onions was produced, and the tariff on imported onions was consequently raised to the maximum in order to protect the local growers, because there was a sufficient supply to meet the local demands. Up to the present no attempt has been made at export owing to the lack of the necessary market abroad. No record is available of the quantities produced during recent years.

Some 639 acres are under *coconuts* and 38 acres under *pineapples* but exports of these products are trifling.

2. FORESTRY.

The Colony is sub-tropical and both temperate and tropical trees exist, the pine-tree and the palm growing literally side by side. It is probable that at one time all the islands were thickly wooded but little forest now remains except on Abaco, Andros, and Grand Bahama, where there are extensive pine-forests. On Andros there is also a certain amount of mahogany and hardwood.

The pine-trees are suitable for conversion into lumber and the whole of the forests are let on licence to private firms who pay a royalty on all timber obtained. There are three such timber concessions or licences, which together cover an area of 447 square miles. In 1933, however, active work has been carried out on one only of these areas.

The total amounts of "Abaco pine" timber exported in recent years have been as follows:—

	Quantity in super-feet.	Value in £		Quantity in super-feet.	Value in £
1929	2,480,000	19,319	1932	5,466,000	26,799
1930	281,000	5,206	1933	4,347,000	22,724
1931	2,010,000	10,015			

Exports go principally to Cuba and the British West Indies.

Other woods, particularly *lignum vitae*, logwood, madeira, and cedar also exist in small quantities and some export takes place:—

	Quantity in Tons.	Value in £		Quantity in Tons.	Value in £
1929	128	509	1932	51	261
1930	69	274	1933	130	605
1931	29	110			

Cascarilla bark is a minor forest product of some importance, exports during recent years having been as follows:—

	Quantity in Cwts.	Value in £		Quantity in Cwts.	Value in £
1929	387	2,842	1932	219	1,464
1930	800	3,538	1933	300	983
1931	203	1,263			

Exports go entirely to United Kingdom and the United States of America.

3. ANIMAL HUSBANDRY.

The number of live-stock in the Colony in 1933 was estimated at the following:—

Sheep	17,116	Swine	4,757
Goats	9,700	Horned cattle	2,135
Poultry	40,369	Horses	1,827

Attention is being directed to the possibilities of raising small stock and poultry for local consumption and there seems little doubt that given suitable cold storage facilities, the Colony could produce considerable quantities of meat of inferior quality, as well as other foodstuffs, which are at present imported, as there is a ready market in Nassau for all out-island stock.

It is, however, unlikely that the Colony will ever become self-supporting in its meat supply, and there is at present no prospect of building up an export trade. One of the main difficulties is the inadequacy of transport between Nassau and the out-islands.

4. MINERALS.

The islands are of coralline formation and contain no mineral wealth.

5. FISHERIES AND MARINE PRODUCTS.

The Colony is the most important producer of sponges within the British Empire and these constitute at present the most important article of export. The output has been considerably diminished of recent years owing, apparently, to ruthless fishing and more especially to wholesale destruction of sponges by each successive hurricane. Artificial sponge culture has now been resorted to and has been productive of encouraging results round Andros and Exuma islands.

Exports during recent years have been as follows:—

		Quantity in	Value in			Quantity in	Value in
		lb.	£			lb.	£
1929	...	673,000	105,820	1932	...	683,000	78,202
1930	...	605,000	75,351	1933	...	814,000	84,852
1931	...	795,000	85,340				

The principal countries of destination are the United States of America, France, and the United Kingdom, which between them take about 54 per cent. of the total exports, and various other European Countries, Canada, and Japan.

Conch- and *turtle-shell* find a limited and fluctuating market, exports during recent years having been as follows:—

				<i>Conch-shell.</i>		<i>Turtle-shell.</i>	
				Number.	Value in £	Quantity in lb.	Value in £
1929	...	...	...	87,707	414	11,112	17,048
1930	...	...	...	81,797	354	4,233	7,003
1931	...	...	...	58,869	396	4,978	6,165
1932	...	...	...	38,603	281	5,524	6,677
1933	...	...	...	34,653	196	3,622	3,510

The turtle-shell goes almost entirely to the United Kingdom

Fish abound in the Bahamas. Considerable quantities are caught for local consumption but there is little attempt at export. The following are the quantities and values of fish sold in the Nassau market during the past 5 years:—

		Quantity.	Value.			Quantity.	Value.
		lb.	£			lb.	£
1929	...	1,493,000	56,000	1932	...	1,300,000	25,000
1930	...	1,400,000	55,000	1933	...	1,200,000	20,000
1931	...	1,300,000	25,000				

There has been a lively export trade in crawfish during the past three or four years and in 1933 there was a total export of approximately 300,000 lb. valued at £1,250. These exports have been principally from Bimini, Grand Bahama and Abaco.

6. OTHER PRODUCTS.

Coarse *salt* is obtained from salt-ponds on several islands, notably Ragged Island and Inagua. The salt industry was formerly of considerable value to the Colony, but has now shrunk to negligible dimensions. Exports in recent years have been as follows:—

		Quantity in	Value in			Quantity in	Value in
		Bushels.	£			Bushels.	£
1929	...	22,000	245	1932	...	7,000	126
1930	...	88,000	876	1933	...	79,000	765
1931	...	53,000	970				

B.

FOOD SUPPLIES.

Owing to the large tourist traffic (see Section VII) for which substantial imports of food are necessary, it is difficult to say how far the permanent population of the Colony is or could be self-supporting in food. At present the local production of food is small, but in the event of a serious decline of the tourist trade and consequent inability to pay for imports of food, the local production of vegetables, fruits, and other foodstuffs could no doubt be largely increased. Any such development would, however, involve a very substantial economic dislocation and turnover of labour to agricultural occupations and probably migration from the present most thickly populated areas.

VI.—Industry.

There are two saw-mills (employing about 200 persons), used in connexion with the exploitation of the pine-forests, in addition to a number of "public utility" establishments such as the electric power station and the ice plant. Otherwise there is no industrial development

VII.—Other Economic Activities.

The tourist traffic is of paramount importance in the economic life of the Colony, which is largely dependent for its economic stability on the profits from this traffic. The Colony is a favourite place of resort for winter visitors, particularly from the United States, the number of visitors in 1933 being 6,921. The tourist centre in New Providence.

No attempt has been made to calculate the actual cash value of this traffic to the Colony. It has of course been impaired by the serious depression of the last two or three years. It is clear that it plays the major part in counter-balancing the large excess of imports over exports which is a permanent feature of the trade of the Colony. In the five years 1929-1933 imports averaged £1,351,746 and exports £279,795, an excess of imports of £1,071,951. (In 1933 the excess was £749,580.) These figures very plainly indicate the small part in the Colony's economic structure occupied by physical exports. It is probable that another "invisible export" has in the past consisted of illicit exportations of liquor to the United States of America despite the efforts of the authorities both in the Bahamas and in the United States of America to prevent the traffic. The imports of spirits averaged £567,285 in the five years 1928-1932. The value of spirits and beer imported during 1933 was £365,080, while for the nine months ended 30th September, 1934, it was only £150,636 indicating that the re-export of spirits, etc. has virtually ceased.

The large proportion of permanent white inhabitants has been noted and it is understood that some of them draw substantial incomes from investments abroad, thus helping to pay for the excess of imports. The total of such remittances of investment income from abroad has been estimated at £30,000 annually.

VIII.—Communications.

(i) INTERNAL COMMUNICATIONS.

In New Providence there are good roads and many of them have been oiled in recent years. In the out islands there is at present little wheeled traffic and most of the roads are impassable for vehicles but the construction of good earth roads has been begun and these will, it is hoped, facilitate agricultural development. There were 1,055 motor vehicles licensed in 1933, understood to be used almost entirely in New Providence.

Communication between Nassau and the out islands is maintained by regular subsidized services of sailing vessels and motor-boats. Intercommunication is rendered difficult by the numerous shoals and rocks which impede navigation. Numerous lighthouses are maintained partly by the Bahamas Government and partly by the United Kingdom Board of Trade.

(ii) EXTERNAL COMMUNICATIONS.

Passenger services between Nassau and New York and Nassau and Miami are maintained fortnightly throughout the year by the Munson Line which is under contract with the Bahamas Government. During the winter months a weekly service is maintained between Nassau and New York by the Cunard White Star Line and a biweekly service between Nassau and Miami by the Clarke Steamship Line. A fortnightly service to Bermuda and Canada and to Jamaica is maintained by the Canadian National Steamships. A monthly passenger service from the United Kingdom via Bermuda is maintained by the Pacific Steam Navigation Company, and monthly services of cargo vessels by the Leyland, Harrison, and Royal Mail Lines. The only port other than Nassau at which there is any considerable shipping is Inagua. In 1933, 1,590 steamers and sailing vessels (total tonnage 3,024,320) entered and cleared the ports of the Colony. Of these 855 (2,959,012 tons) entered and cleared at Nassau and 87 (41,185 tons) at Inagua.

Nassau is the only important harbour; there are anchorages both within and outside the bar, over which a passage of 730 feet, with a minimum depth of 27 feet, has been dredged; and wharves aggregating 2,300 feet in length with depths varying from 12 feet to 15 feet. There are no enclosed docks or dry docks but there is one small slipway.

A daily air service between Nassau and Miami with aeroplanes carrying 24 passengers is maintained during the winter by Pan-American Airways, Incorporated. During the rest of the year there is a service twice weekly.

IX.—Tariff.

Duties are levied on all imports with the exception of a number of certain specially exempted articles. Specific duties or special *ad valorem* duties are provided for a number of articles, including the principal foodstuffs, tobacco, and alcoholic liquors; all other goods are subject to a duty of 20 per cent. *ad valorem*. On a number of agricultural products, capable of production in the Colony, provision is made for the imposition of higher rates of duty (generally at about five times the minimum duty) by special order and in a few cases these higher duties are in operation. Rebates and drawbacks are provided for goods imported for various special purposes or re-exported within a limited period.

Imperial Preference is provided for by the grant of a rebate on all duties chargeable, amounting to 50 per cent. of the duty except in a few cases where special provision is made.

X.—Trade Representatives.

The West India Committee act as unofficial trade representatives in London, as for other Colonies of the West Indian group.

BARBADOS.

I.—Situation, etc.

Barbados, the most easterly of the West Indian Islands, is situated in latitude 13° 4' North and longitude 59° 37' West. The island is triangular in shape and is 21 miles long and 14 miles across the widest part, while its area is 106,470 acres, approximately 166 square miles.

The climate is healthy. There is no marked variation in temperature between the different months, although the period from December to May, during which the island gets the full benefits of the cool north-east trade winds, is regarded as the cool, dry season. In 1933 the highest monthly mean maximum was 87.1° F. (in May) and the lowest monthly mean maximum 82.0° F. (in February), while the highest monthly mean minimum was 74.3° F. (in July) and the lowest monthly mean minimum 68.8° F. (in February). The rainfall varies in different parts of the island and ranges, on the average, between 40 inches on the coastal area in the south to 80 inches in the higher altitudes. At the Government Meteorological Station, 181 feet above sea level, the average during the past ten years has been 48.72 inches.

There is no vacant Crown Land in Barbados; the island was first settled over 300 years ago and is now thickly populated and closely cultivated. There are no large estates in the island, the largest being about 500 acres. From figures compiled for the West Indian Sugar Commission in 1929 it appeared that at that time there were 18,002 holdings of less than 10 acres, 203 of from 10 to 50 acres, 62 of from 51 to 100 acres, and 210 of from 101 to 500 acres.

The acreage of the small holdings was recently calculated as follows:—

						Acres.
Holdings of less than 1 acre	...	...	...	...	...	3,514
Holdings of between 1 and 3 acres	...	...	...	...	...	6,450
Holdings of between 3 and 5 acres	...	...	...	...	...	1,800
Holdings of over 5 acres	...	...	...	...	...	2,185
						13,949

There has been a certain movement in recent years in the direction of dividing up certain estates into small peasant holdings, but no such division took place in 1933-34.

II.—Population.

No census has been taken since 1921, but the population on the 31st of December, 1933, was estimated at 180,055. The population is therefore exceptionally dense, over 1,000 to the square mile. There is an annual increase due to excess of births over deaths, which has been supplemented during recent years by a steady stream of returning emigrants, mostly from the American continent, the annual average since 1921 having been about 1,000.

According to the information collected at the 1921 census the racial constitution of the population was as follows:—

								Per cent.
White	...	...	...	...	...	...	...	7
Mixed	...	...	...	...	...	...	...	22
Black	...	...	...	...	...	...	...	71
								100

The proportion of persons of pure European descent permanently settled in Barbados (in many cases for generations) is much above the average in the West Indies and in other tropical dependencies.

Statistics relating to employment were as follows:—

Agricultural	...	...	...	...	...	...	...	34,157
Commercial...	...	...	...	...	...	...	...	13,169
Domestic Service	...	...	...	...	...	...	...	25,255
Educational (teachers and students)	...	...	...	...	...	...	...	26,208
Industrial	...	...	...	...	...	...	...	23,682
Miscellaneous	...	...	...	...	...	...	...	2,025
Official	...	...	...	...	...	...	...	1,175
Professional	...	...	...	...	...	...	...	322
								125,993
Children, visitors, persons without occupation, etc.	...	...	...	...	...	...	...	30,319
								156,312

It may be assumed that, although the total population has since increased, the percentage of persons employed in various occupations has probably remained substantially the same.

Those in "commercial" employment include a large number of casual labourers occupied as lightermen, porters, etc., on the wharves at Bridgetown, and those in "industrial" employment a large number of artisans engaged in various trades.

III.—Finance.

A. CURRENCY AND BANKING.

1. Accounts are kept in sterling by Government Departments and in dollars and cents (at the fixed rate of \$1 = 4s. 2d., 1 c. = $\frac{1}{4}$ d.) by banking and commercial houses. British sterling coin is legal tender and the chief metallic money in use, but some Canadian and United States of America coinage is also in circulation. There are also bank-notes in dollar denominations in circulation, the estimated amount in circulation on the 31st of December, 1933, being:—Barclay's Bank (Dominion, Colonial, and Overseas) \$255,080, Royal Bank of Canada \$123,000, Canadian Bank of Commerce \$66,280.

2. The three note-issuing banks each maintain one branch in the Colony. There is a Government Savings Bank in the Colony; the number of depositors on the 31st of December, 1933, was 11,907 and the total amount of deposits £857,600.

The Sugar Industry Agricultural Bank was established in 1907 with the assistance of a grant of £80,000 made by the Imperial Treasury in 1902 to assist the sugar industry. The Bank is controlled by a Board of seven members under the Chairmanship of the Colonial Secretary. The capital of the Bank on the 31st of May, 1934, was £224,593. The Bank makes short-term loans to plantations as required, the capital and interest being secured by a first lien and charge on the plantation.

3. The Government does not conduct any other form of banking business.

B. PUBLIC FINANCE.

1. Public Debt.

(a) At the 31st of March, 1934, the total public debt was £267,920.

(b) The provision for interest and sinking fund for the year 1934-35 is:—

Interest £10,920.

Sinking Fund £2,680

(c) The accumulated sinking funds at the 31st of March, 1934, amounted to £41,378.

Details regarding Loans.

<i>Name of Loan.</i>	<i>Amount of Loan. £</i>	<i>Amount outstanding. £</i>	<i>To whom due.</i>	<i>Sinking Fund. £</i>
Public Loan Act 1914 and Reimbursement Acts 1914 and 1916.	37,000	37,000	Sundry Debenture Holders.	11,524
Public Loan Act 1928	90,000	90,000	do.	3,146
General Local Loan Act, 1933 and the Public Loans (Redemption) Acts 1933, Nos. 26 and 46.	140,920	140,920	do.	26,708
				£41,378

2. (A) *Analysis of Revenue (on the basis of the Estimates for 1934-35).**Self-balancing Departments.*

	<i>Revenue. £</i>	<i>Expenditure. £</i>	<i>Surplus (+) or Deficit (-). £</i>
Harbour	7,300	6,231	+ 1,069
Market	1,300	999	+ 301
Post Office	14,250	14,477	- 227
Railway	9,000	11,680	- 2,680
	£31,850	£33,387	

Net Deficit £1,537.

Ordinary Revenue.

	<i>£</i>	<i>£</i>	<i>Percentage.</i>
1. Customs Department—			
Import duties	185,000		
Tonnage dues	15,500		
Other	1,790		
		202,290	55·7
2. Excise		52,250	14·4
3. Income-tax		35,000	9·6
4. Other heads of Revenue		73,844	20·3
		363,384	100
Revenue of self-balancing Departments set-off against Expenditure		31,850	
		£395,234	

2. (B) *Analysis of Import duties for 1933.*

Amount of duty collected on articles imported from:—

					<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
					£	£	£	£
Class I	...	...	...	...	29,543	28,712	39,734	97,989
Class II	...	...	...	...	315	3,215	7,577	11,107
Class III	...	...	...	...	37,255	23,811	25,143	86,209
Class IV	...	...	...	...	3,439	1,075	1,168	5,682
					<u>70,552</u>	<u>56,813</u>	<u>73,622</u>	<u>200,987</u>
Seized and unclaimed articles and baggage	...	...	...	...	...	...	...	1,715
								<u>202,702</u>

3. *Analysis of Expenditure (on the basis of the 1934-35 Estimates):—*

					£	Percentage.
1. Loss on self-balancing Departments	...	...	...	...	1,537	·4
2. Debt charges	...	...	...	...	13,950	3·9
3. Administration	...	...	...	...	166,428	46·1
4. Economic Development	...	...	...	...	30,458	8·4
5. Social Services	...	...	...	...	116,820	32·3
6. Defence	...	...	...	...	3,691	1·0
7. Non-effective, i.e., Pensions	...	...	...	...	28,565	7·9
					<u>361,449</u>	<u>100</u>
Expenditure of self-balancing Departments set-off against Revenue	...	...	...	...	31,850	
					<u>£393,299</u>	

4. As at the 31st of March, 1934, there was a surplus of Assets over Liabilities of £358,791. There was also at this date to the credit of Current Account, Barclay's Bank (Barbados Branch), the sum of £26,462.

5. No grants-in-aid or loans-in-aid of administration have been received from Imperial funds.

Barbados has received the following assistance from the Colonial Development Fund and the Empire Marketing Board:—

(1) *Colonial Development Fund.*

A free grant of £4,000 for a Venereal Diseases Clinic.

A loan of £16,300 free of interest for two years for a Public Market.

A free grant of £6,000, representing one-third of the expenditure, for the erection of a pumping station at the Bowmanston Water Works.

(2) *Empire Marketing Board.*

A grant of £2,300 for a British West Indian Cane Breeding Station. From 1933 this grant has been continued from the Colonial Development Fund.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

					<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.*</i>
					£	£	£	£
1913	...	...	...	...	79,334	566,672	114,693	760,699
1930	...	...	...	...	44,213	900,297	94,576	1,039,086
1931	...	...	...	...	47,151	855,224	141,076	1,043,451
1932	...	...	...	...	327,794	941,763	99,834	1,369,391
1933	...	...	...	...	446,314	874,683	48,966	1,369,963

* Excluding exports for Ships' Stores and of coal for bunkers as follows:—

					<i>Ships' Stores.</i>	<i>Coal for bunkers.</i>	<i>Total.</i>
					£	£	£
1913	...	...	...	...	—	95,919	95,919
1930	...	...	...	...	9,993	13,837	23,830
1931	...	...	...	...	6,314	14,286	20,600
1932	...	...	...	...	7,530	2,085	9,615
1933	...	...	...	...	7,053	1,689	8,742

(ii) *Domestic Exports by Classes, 1933.*

	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
<i>To:—</i>					
United Kingdom	439,958	2,109	242	—	442,309
Canada	702,805	—	111	—	702,916
Newfoundland	37,549	—	—	—	37,549
Rest of Empire	26,056	7,205	570	200	34,031
<i>Total Empire</i>	<i>1,206,368</i>	<i>9,314</i>	<i>923</i>	<i>200</i>	<i>1,216,805</i>
United States of America... ..	33,765	2,988	247	—	37,000
Other foreign countries	1,780	1,912	—	20	3,712
<i>Total foreign countries</i>	<i>35,545</i>	<i>4,900</i>	<i>247</i>	<i>20</i>	<i>40,712</i>
Ships' Stores	675	—	1	—	676
GRAND TOTAL	1,242,588	14,214	1,171	220	1,258,193

(iii) *Principal Domestic Exports, 1933.*

<i>Class I.</i>	<i>Article.</i>		<i>Quantity.</i>	<i>Total Value.</i> £	<i>Principal Countries of destination with amounts</i> <i>in £'000.</i>
	Sugar—				
	Dark Crystals	...	61,827 tons	623,164	Canada (330), United Kingdom (283), Grenada(9).
	Muscovado	...	17,167 tons	165,019	United Kingdom (151), Canada (11), St. Vincent (2).
			78,994 tons	788,183	
	Molasses—				
	Choice	...	437,690 gal.	21,885	Newfoundland (18), Canada (2).
	Fancy	...	7,589,813 gal.	411,115	Canada (360), United States of America (32).
					Newfoundland (19).
	Vacuum Pan	...	975,771 gal.	3,812	United Kingdom (3).
			9,003,274 gal.	436,812	

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	518,611	373,716	460,732	1,353,059
1930	582,944	604,726	544,116	1,731,786
1931	518,178	534,866	438,330	1,491,644*
1932	763,581	545,678	347,485	1,656,876*
1933	834,636	511,588	393,857	1,740,161*

(ii) *Imports by Classes, 1933.*

	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
<i>From:—</i>					
United Kingdom	159,133	9,781	617,874	33,148	819,936
Canada	96,082	64,411	41,714	3,433	205,640
British Guiana	42,224	28,987	1,595	1,139	73,945
India	33,500	23	26,545	—	60,068
Trinidad	9,486	986	46,975	920	58,367
Rest of Empire	68,220	11,412	11,553	15,783	106,968
<i>Total Empire</i>	<i>408,645</i>	<i>115,600</i>	<i>746,256</i>	<i>54,423</i>	<i>1,324,924</i>
United States of America... ..	70,503	36,227	62,152	11,464	180,346
Germany	7,066	102	34,522	—	41,690
Japan	—	—	34,926	—	34,926
Argentina	34,364	156	1	—	34,521
Holland	24,295	—	9,990	—	34,285
Other foreign countries	24,067	15,830	23,839	4,353	68,089
<i>Total foreign countries</i>	<i>160,295</i>	<i>52,315</i>	<i>165,430</i>	<i>15,817</i>	<i>393,857</i>
High Seas	80	—	—	—	80
GRAND TOTAL	569,020	167,915	911,686	70,240	1,718,861

In addition there were imports of bullion and specie to the value of £14,700 from the United Kingdom, and £6,600 from the rest of the Empire; total £21,300.

* Includes imports from "High Seas" as follows:—

1931 ...	£270	1932 ...	£132	1933 ...	£80
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(iii) *Principal Imports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total Value. £</i>	<i>Principal Countries of Origin with amounts in £'000.</i>
<i>Grain, flour, meal, pulse, etc.—</i>				
	Rice	138,340 cwt.	65,849	British Guiana (37), India (28).
	Flour, wheaten or rye	85,239 bags	32,427	Canada (16), United Kingdom (16).
	Oats	40,501 cwt.	19,279	Canada (19).
	Maize or Corn Meal	25,078 bags	13,374	United States of America (10), United Kingdom (2), Argentine (1).
	Pulse (beans and peas)	17,451 cwt.	12,216	Germany (5), United Kingdom (3), Trinidad (2), Holland (1).
	Other kinds	—	13,670	Argentine (9), Canada (2).
			156,815	
<i>Meats—</i>				
	Beef, salted... ..	14,465 cwt.	27,002	Argentine (11), United Kingdom (11), United States of America (3), Canada (2).
	Pork, salted	13,210 „	22,192	Canada (14) United States of America (8).
	Bacon and Hams	2,433 „	15,896	United States of America (7), United Kingdom (5), Canada (3).
	Other kinds	3,244 „	9,020	United Kingdom (3), Argentine (3).
			74,110	
<i>Fish—</i>				
	Dried, salted or smoked	—	55,165	Newfoundland (42), Canada (13).
	Other kinds	—	10,242	Canada (7).
			65,407	
<i>Cattle, etc., foods—</i>				
	Oil meal and cake	86,297 cwt.	30,204	United States of America (26), Canada (4).
	Other kinds	42,644 „	11,471	Argentine (8).
		128,941 „	41,675	
<i>Butter and substitutes—</i>				
	Butter	4,257 cwt.	26,228	United Kingdom (11), France (8), New Zealand (4).
	Oleo margarine	4,498 cwt.	15,114	Holland (11), United Kingdom (4).
		8,755 „	41,342	
<i>Edible Oils</i>				
		390,135 gal.	39,013	United Kingdom (37).
<i>Tobacco—</i>				
	Unmanufactured	135,716 lb.	6,785	United States of America (3), India (2), Canada (1).
	Cigarettes	9,708 „	6,553	United Kingdom (6).
	Other manufactures	18,369 „	5,869	United States of America (4).
		163,793 „	19,207	
<i>Class II.</i>				
	Wood and Timber	—	106,642	Canada (64), United States of America (35).
	Wood for fuel	15,937 tons	19,921	British Guiana (18).
	Charcoal	4,666 „	13,998	British Guinea (9), St. Lucia (4).
<i>Class III.</i>				
<i>Cotton Manufactures—</i>				
	Piece-goods	5,495,710 lin. yd.	119,497	United Kingdom (87), Japan (27).
	Hosiery	—	10,588	United Kingdom (8).
	Other kinds	—	65,575	United Kingdom (61).
			195,660	
<i>Manures and Fertilizers (all kinds)</i>				
		11,096 tons	92,790	United Kingdom (67), Germany (18).
<i>Machinery and Apparatus (all kinds)</i>				
		—	77,459	United Kingdom (67), United States of America (8).
<i>Motor Cars, etc., and parts—</i>				
	Motor Cars	210	28,491	United Kingdom (20), Canada (6).
	Motor Trucks	85	11,046	Canada (7), United Kingdom (2), United States of America (2).
	Motor Car, etc., parts, etc.	—	17,049	United Kingdom (7), United States of America (5), Canada (4).
			56,586	
<i>Oils—</i>				
	Motor Spirit	932,855 gal.	27,209	Trinidad (27).
	Kerosene	301,697 „	12,571	Trinidad (11), United States of America (1).
	Other kinds	—	11,455	United Kingdom (4), Trinidad (3), United States of America (2).
			51,235	

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i> £	<i>Principal Countries of Origin with amounts</i> <i>in £'000.</i>
<i>Class III—contd.</i>			
Boots and Shoes—			
Rubber and canvas with rubber soles	104,993	10,500	Malaya (6), Hong Kong (2).
Other kinds	—	29,523	United Kingdom (25), Czechoslovakia (3).
		40,023	
Iron and Steel Manufactures	—	37,851	United Kingdom (32).
Apparel	—	28,358	United Kingdom (19), United States of America (5), Japan (3).
Bags and Sacks	958,946	26,635	India (24).
Hardware	—	23,469	United Kingdom (15), United States of America (3), Germany (3).
Paper Manufactures—			
Writing, wrapping, etc. ...	—	15,104	Holland (5), United Kingdom (4).
Other kinds	—	7,981	United Kingdom (6).
		23,085	
Woollen Manufactures ...	—	22,042	United Kingdom (21).
Soap (all kinds)	—	20,341	United Kingdom (19).
Medicines and drugs	—	18,325	United Kingdom (12), United States of America (4).
Hats and bonnets	—	15,889	United Kingdom (13), Italy (2).

V.—Natural Resources.

A.

1. AGRICULTURE.

The agricultural practice of Barbados is entirely based on the sugar-cane, the products of which represent between 90 and 95 per cent. of all domestic exports. Such other crops as are cultivated are grown either during the preparation of the land for planting sugar-cane or to enable the land to be rested from that crop. Almost the whole population is dependent, directly or indirectly, on sugar. The standard of living of all classes is affected by the value of the sugar crop and periods of depression or poor crops entail general decline, although cases of actual want are rarely noticeable.

All the 67,000 acres of arable land are used for growing sugar but only 35,000-40,000 acres of sugar-cane are reaped each year. Units of production are not large and plantations vary in size from 500 acres downwards. Some plantations, or groups of plantations, are worked as units with their own factories, but most producers, including the smaller plantations and all the peasant cultivators, sell their canes to separately-owned factories at prices which vary with the price of sugar.

In old times every plantation had its own windmill and "sugar-works," but the necessity for cheaper production and the elimination of wasteful methods of manufacture led to the erection of muscovado sugar plants and eventually of modern factories, which are highly efficient and have, on occasion, had an intake of no more than seven and a-quarter tons of cane for each ton of sugar produced during a grinding season.

Nevertheless owing to the inaccessible position of some plantations and the conservatism of a few owners there are still to be found windmills and muscovado sugar works as well as modern factories.

Owing to numerous very deep gullies, which render transport of cane difficult or impracticable, the size of the factories has to be limited and the largest are only capable of producing some 8,000 tons of sugar during a grinding season.

During 1934, 30 factories, equipped with vacuum pans, manufactured 96° dark crystal sugar, 40 steam plants equipped with aspinall pans manufactured either muscovado sugar or fancy molasses, and 2 factories and approximately 40 sugar works driven by windmills were in operation for the production of fancy molasses.

In Barbados the manufacture of syrup known as "fancy molasses" is of very considerable importance. This fancy molasses should not be confused with vacuum pan molasses (the final uncrystallizable residue of sugar manufacture), for it is prepared from the fresh juice of the sugar-cane from which nothing has been previously extracted.

About 20,000 tons (or 60,000 puncheons each containing 110 wine gallons) are manufactured each year and practically the whole product is absorbed by the lumbermen and fisherfolk of eastern Canada and Newfoundland.

The value of fancy molasses depends on the world price of sugar, and when the latter is low there is a tendency for fancy molasses to have a premium above the price of sugar, which on occasion has resulted in over-production; but during 1934, although approximately 85,000 puncheons have been produced, there has been a definite shortage of the syrup.

As regards cost of production, Barbados, largely owing to the fertility of the soil, high sucrose content of the sugar-cane juices and the plentiful supply of labour, is able to produce as cheaply as any other part of the Empire. Considerable quantities of artificial fertilizers and of pen-manures (for the production of which rather more live-stock are kept than would otherwise be necessary) are used in order that yields may be maintained at a high level.

Barbados maintains a highly organized Department of Science and Agriculture which in addition to the development of Harrison and Bovell's work on the breeding of new sugar-cane varieties

is devoting considerable attention to control of pests and disease. During 1933 with the aid of a grant from the Empire Marketing Board and after the cessation of this Board, from the Colonial Development Fund the sugar-cane breeding work has been continued to include the breeding of seedling canes suitable to the conditions met with in other British West Indian Islands.

Consumption of sugar within the Colony may be estimated at about 5,500 tons, after converting molasses into an appropriate equivalent in sugar; local consumption of rum in 1933 was 204,580 gallons.

Exports of sugar products during recent years have been as follows:—

<i>Sugar.</i>				<i>Molasses.</i>				<i>Rum.</i>			
		Tons.	£			Gallons.	£			Gallons.	£
1929	...	65,517	722,389			8,035,779	233,813			46,130	4,517
1930	...	50,444	473,152			9,085,307	305,620			65,390	6,402
1931	...	34,422	360,639			7,790,451	426,073			56,683	5,314
1932	...	74,710	732,948			8,451,078	423,175			47,137	4,517
1933	...	78,994	788,163			9,003,274	436,812			41,926	4,018

In terms of sugar alone (converting fancy molasses at the rate of 330 gallons to the ton) total production during recent years has been as follows:—

			Tons.				Tons.
1929	...	...	87,798	1932	...	...	102,415
1930	...	...	82,682	1933	...	...	117,175
1931	...	...	61,531	1934	...	...	111,434

Consequent on the increase of the preference on sugar granted by the United Kingdom in 1932, the export of this commodity to the United Kingdom increased as compared with exports to Canada, exceeding the latter by about 10,000 tons. Exports of molasses went mainly to Canada with smaller quantities to the United Kingdom, Newfoundland and the United States of America.

The only other plantation crop of any significance is **Sea Island cotton**, which is cultivated chiefly in the drier parts of the Island. The crop is suitable for peasant cultivation, but cultivation has been restricted in recent years on account of the pink bollworm. In 1929-30 only 272 acres were under this crop, but 2,800 acres were cultivated in 1930-31. In the following year a considerable reduction of acreage took place on account of the depression in the Sea Island cotton market, and in 1933-34 only 62 acres were planted.

Exports of cotton during recent years have been as follows:—

			lb.	£			lb.	£
1929	...	...	8,858	728	1932	...	21,561	963
1930	...	...	25,426	3,029	1933	...	69,605	3,149
1931	...	...	336,899	21,056				

There is a considerable cultivation of "**ground provisions**," such as yams, sweet potatoes, and eddoes, particularly by peasants and small-holders, and there is considerable market-garden production of these vegetables and also fruit, for sale to the population of Saint Michael (the parish containing Bridgetown, the principal urban area) which is estimated to be approximately 65,000. There is still considerable scope for production of this kind for the home market, as there are substantial imports of fresh vegetables.

Exports of ground provisions were being steadily developed, until in 1930 they reached a total of £10,169. The principal countries of destination were British Guiana, Trinidad, and the Dutch West Indies but owing to the prohibitive import duties placed upon these commodities by the importing countries the trade had dwindled in 1933 to £4,202.

The value of the domestic exports of Ground Provisions during the last five years was as follows:—

			Value in £				Value in £
1929	...	...	7,956	1932	...	...	7,393
1930	...	...	10,169	1933	...	...	4,202
1931	...	...	9,235				

2. FORESTRY.

There are only 46 acres of original forest now left in the Colony. For many years this area has been preserved by Statute.

Firewood is imported from other Colonies.

3. ANIMAL HUSBANDRY.

The breeding and rearing of animals is not conducted on any large scale; there is one central market in Bridgetown, in which all persons desiring to sell meat within a radius of one mile of the town must slaughter animals; outside this area there is no inspection.

The principal use of live-stock is for draught purposes, but they are also useful in the production of pen-manure. There are 1,605 horses, 3,545 asses, and 4,420 mules in the Colony, but the number of other animals is unknown.

The high value of land renders the development of an animal industry on economic lines impossible. The extension of breeding is not encouraged, since no land is available for laying down as pasturage so long as sugar cultivation can be carried on economically, and the value of the feeding stuffs grown in association with sugar-cane is so low that they have to be supplemented by expensive imports of other feeding stuffs.

The development of a dairying industry has been assisted by the inauguration of two modern dairies, but the number of persons resident in the colony who have the means to pay for pure milk is too limited for any great extension in the industry.

There are substantial imports both of cattle for slaughter and of meat.

4. MINERALS.

Mineral oil is known to exist in the Colony, but not in considerable quantities. The deposits are exploited by the British Union Oil Company, Limited; the total amount won in each of the last five years, has been as follows:—

Year.					Quantity in barrels of 42 galls.	Value in £
1929	...	...	...	...	7,918	1,649
1930	...	...	...	...	10,014	2,086
1931	...	...	...	...	7,914	1,649
1932	...	...	...	...	4,175	869
1933	...	...	...	...	4,020	837

There are also small deposits of manjak and tar sand, which are exploited to a trifling extent.

5. FISHERIES.

The number of persons engaged in the fishing industry is approximately 1,000, but fishing does not comprise the whole of their activities, since the total value of the catch, all of which is disposed of locally, is estimated at £15,000 a year. Some fishermen own their boats while others use the boats of private owners and are given a percentage of the catch. The principal fish caught in Barbados are the flying fish, dolphin, grouper, king-fish, bream, and snapper.

B.

FOOD SUPPLY.

The total imports of food in 1933 were £411,032 or £2 5s. 7d. per head. As has been indicated above, there is a substantial local production of ground provisions and this and the production of fruits and other vegetables might be developed; but it would be impossible, even if it were economically sound, to make the island entirely self-sufficing in food. Broadly the staple foods are—

- (a) in the case of the labouring population, rice and salt fish;
- (b) in the case of the European population, meat, wheat-flour, and grain.

The principal sources of supply of these articles are shown in Section IV but it is apparent that it is not commercially possible for the island to produce any of them, for climatic and physical reasons, and it could not become self-sufficing without very great changes in the habits of its people. Moreover it is practically certain that no general food-crop could be raised in sufficient quantities to feed a population as dense as that of Barbados to-day, and a substantial import of food must continue to be essential.

VI.—Industry.

The most important industrial activity in Barbados is, of course, the manufacture of sugar.

There are three rum distilleries.

There are one or two industrial establishments of a public utility nature, viz., a gas works, an electric supply works, and two ice factories. There are also two biscuit factories, a cotton factory, engineering works, and one or two other industrial establishments.

No statistics relating to the number of persons employed in these establishments or to the value of the annual output are available.

There is a small peasant earthenware industry in the "Scotland Districts."

VII.—Other Economic Activities.

There is a substantial transshipment business in Barbados, which is a point on the main lines of sea communication from which goods are distributed to the islands lying to the westward. In addition to the transshipment business proper, there are also substantial re-exports of goods actually imported into the Colony.

With regard to tourist traffic a very conservative estimate of its value is £66,500 a year, but if the value of goods sold by tailors, druggists, stores, etc., to tourists and in-transit visitors is included, it is thought that the total should be not less than £80,000 a year.

Figures for the past few years are as follows:—

					1st Class ordinary.	Tourists and in-transit.	Cruise ships.
1930	...	...	...	...	3,379	4,809	No record.
1931	...	...	...	...	3,279	2,760	"
1932	...	...	...	...	3,283	2,556	"
1933	...	...	...	...	3,391	2,758	"

Important items in the invisible exports which go to balance the large excess of imports over exports, which is a permanent and striking feature of the trade of the Colony, are:—

(i) the receipt of interest on investments held abroad by residents in Barbados. Owing to the large permanent European settlement in the Colony considerable capital has been accumulated, and the income from these investments was estimated by the West Indian Sugar Commission, after inquiries among the Banks, at not less than £150,000 per annum.

(ii) The remittances of Barbadians working overseas, e.g., in the Canal Zone and the United States of America, to relatives in the island, estimated by the West Indian Sugar Commission at not less than £100,000 per annum; no up-to-date information is available, but this amount would now be considerably reduced through general trade depression.

(iii) The earnings of Barbadian sailors serving on ships in the West Atlantic trade; but these also would now be considerably reduced since the employment of Canadians instead of West Indians on the ships of the Canadian National Steamship Line.

VIII.—Communications.

The island has a network of roads which lead in every direction. The total length of roads in the Colony is 473 miles, of which 286 miles are classified as main roads and the remainder as cross-roads. Considerable sums of money have been spent since 1926 in rendering the main roads suitable for motor traffic and almost the whole island is now accessible to motor vehicles. The city of Bridgetown and its suburbs are supplied with a good motor omnibus service, operated by a Motor Bus Company and augmented by buses owned by private individuals. Motor buses also ply between the city and the country districts.

A light railway of 2 feet 6 inches gauge, 24 miles long, runs through the southern parishes and along the east coast. Built by private enterprise, it was purchased by the Government in 1916 and is now conducted by a Board of Management whose funds are derived from the Central Government. It provides both a passenger and goods service, but its revenue at the present time is insufficient to cover expenditure.

Bridgetown is a port of call on a number of important shipping lines and there is an excellent mail service with the United Kingdom, Canada, the other West Indian Islands, and the United States of America.

There are fortnightly services to Avonmouth and Cristobal by the Elders and Fyffes Line, to Plymouth and other European ports and Central American ports by the Royal Netherlands Steamship Company, to Canadian ports and British Guiana by the Canadian National Steamships, and the Ocean, Dominion Steamship Corporation (Dominion Service). Other lines calling at monthly or irregular intervals are the Hamburg-Amerika Line, Compagnie Générale Transatlantique, the Bermuda and West Indies Steamship Company, the Ocean Dominion Steamship Corporation (Ocean Service), the Harrison Line, the Booth Line, the Aluminum Line, the Canadian Transport Company, the Dawnic Steamship Corporation, the McCormick Steamship Corporation and the Munson Steamship Line.

A subsidy of £5,000 per annum is contributed by Barbados towards the Canadian National Steamship Service.

651 steam vessels of a total tonnage of 2,154,373 tons entered at Bridgetown in 1933, their nationalities being as follows:—

	<i>Vessels.</i>	<i>Tons.</i>
British	368	1,345,474
Dutch	55	236,283
German	41	195,327
French	44	156,496
Norwegian	96	123,708
United States	31	58,606
Other	16	38,479
	661	2,154,373

452 sailing vessels of a total tonnage of 31,055 tons entered at Bridgetown in 1933, their nationalities being as follows:—

	<i>Vessels.</i>	<i>Tons.</i>
British	382	24,822
Dutch	63	4,600
Other	7	1,633
	452	31,055

Carlisle Bay on which the port of Bridgetown is situated is an open roadstead about 1½ miles wide, where vessels of the largest size can load and unload by means of lighters.

The total length of wharves is about 3,000 feet. Vessels up to 400 tons net, 180 feet long and 14 feet draught can enter the inner harbour and be berthed at the wharves.

Cargo is occasionally shipped from Speightstown but normally the whole of the trade of the island is conducted through Bridgetown.

IX.—Tariff.

Import duties are levied on all articles imported into the Colony other than those contained in a special list of exemptions. Duties are generally at specific rates in the case of foodstuffs, drink, and tobacco and at *ad valorem* rates in the case of manufactured goods but this rule is not invariable. The *ad valorem* rates vary from 2½ per cent. to 10 per cent. on Empire goods and 10 per cent. to 30 per cent. on foreign goods, the most usual rates being 10 per cent. and 20 per cent. respectively, these being the rates applicable to goods not specially charged or exempted.

A surtax of 10 per cent. of the duty is at present charged on all goods.

Preference is granted to Empire goods in every case where a duty is chargeable; the general margin of preference is 50 per cent. of the duty applicable to similar foreign goods, but it may be higher or lower, and in a few cases Empire goods are admitted free while foreign goods are dutiable.

X.—Trade Representatives.

The Colony does not maintain any representatives abroad, but the West India Committee acts in London as unofficial trade representative for Barbados as well as other West Indian Colonies.

BERMUDA.

I.—Situation, etc.

The Bermuda or Somers Islands are a cluster of numerous small islands situated in the West Atlantic Ocean in approximately latitude 32° 15' N. and longitude 64° 51' W. and comprise an area of about 19½ square miles.

The largest island is known as Main Island and is about 9,000 acres in extent.

Practically all land, other than the land in the occupation of the Naval and Military Authorities (which is approximately 2·2 square miles in extent), is in private possession. The holdings on which produce is grown for sale number 350, the majority of which are of less than 10 acres each.

The climate is good, the thermometer never falling below 40° F. and seldom rising above 90° F. In 1933 the highest monthly maximum was 90° F. (in July) and the lowest monthly maximum 73° F. (in February) while the highest monthly minimum was 70° F. (in August) and the lowest monthly minimum 48° F. (in January).

The rainfall is usually a little less than 60 inches a year and is distributed more or less evenly throughout the year. In 1933, July with 13·6 hours of rain was the driest and April with 68·1 hours of rain the wettest month. The mean daily sunshine throughout the year was nearly 7·4 hours, with a lowest monthly average of 5·5 hours daily in January and February, and a highest monthly average of 10·2 hours daily in July.

II.—Population, etc.

The total population of the Colony according to the 1931 census was 27,789 of which number 11,353 were classified as white and 16,436 as coloured. The estimated population in 1933 was 29,116 of whom 11,684 were white and 17,432 were coloured. The density of the population is exceptionally high, about 1,500 per square mile, or 1,710 per square mile if the area in naval and military occupation is excluded.

Hamilton, the capital, has a population of 3,000.

The population has increased from 20,127 in 1921 and continues to show an annual natural increase (529 in 1933). 536 persons were shown as "planters" and 1,354 as engaged in commerce.

The increase in the density of the population during the last twelve years is striking, and as the density, which is already very high, is still increasing at the rate of about 30 per square mile annually it seems fairly clear that the means of providing occupation for this increasing population is the major economic problem of the Colony.

III.—Finance.

A. CURRENCY AND BANKING.

1. Sterling is legal tender and there is a local issue of £1 and 10s. notes. United States and Canadian currency, while not legal tender, are current.

2. There are two private banks in the Colony, the Bank of Bermuda, Limited, and the Bank of N. T. Butterfield and Son, Limited, as well as a Post Office Savings Bank with 5,847 depositors with £90,503 on deposit on 31st December, 1933.

B. PUBLIC FINANCE.

1. Public Debt.

(a) At the 31st December, 1933, the total public debt outstanding was £117,476.

(b) The amounts provided in the Estimates for 1934 for interest, sinking funds and repayment are

	£
(1) Interest	5,550
(2) Sinking Fund	775
(3) Instalment of Loan	5,000

(c) The amount paid into the Sinking Fund on the 31st December, 1933, was £38,053 7s. 10d. (market value).

2. Revenue.

(a) *Analysis of Revenue (on the basis of Estimates for the year 1934).*

Self-balancing Department.

	Revenue. £	Expenditure. £
Post Office	25,000	17,277
Net surplus £7,723.		

General Revenue.

	£	Percentage.
1. Customs Duties	246,129	70·2
2. Miscellaneous	15,046	4·3
3. Reimbursements	81,508	23·3
4. Surplus of self-balancing Department	7,723	2·2
Revenue of Post Office set off against Expenditure... ..	350,406	100
	17,277	
Gross Revenue	367,683	

(b) *Analysis of Import Duties.*

Statistics not available.

3. *Expenditure.**Analysis of Expenditure (on the basis of Estimates for 1934).*

	£	Percentage.
1. Deficit on self-balancing Department	Nil	—
2. Debt Charges	11,325	3·3
3. Administration	123,535	36·2
4. Economic Development	98,541	28·8
5. Social Services	87,485	25·6
6. Defence	11,047	3·2
7. Non-effective, i.e., Pensions	9,710	2·9
	341,643	100
Expenditure of Post Office set off against Revenue... ..	17,277	
Gross expenditure	358,920	

4. *Reserve Funds, etc.*

On the 31st December, 1933, the excess of assets over liabilities was £171,635. Of this sum £50,718 was liquid.

5. *Grants-in-aid.*

No grants- or loans-in-aid have been received from His Majesty's Government.

The only assistance received from the Colonial Development Fund is a free grant of £550 towards the expenses of a visit paid by Major Mayo in connexion with aviation development.

IV.—*Trade Statistics.*

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	5,437	3,582	81,676	90,695
1930	159	31,605	159,963	191,727
1931	—	10,378	108,627	119,005
1932	97	43,116	102,737	145,950
1933	190	43,082	76,306	119,578

(ii) *Domestic Exports by Classes, 1933.*

To:—	Class I.	Class II.	Class III.	Class IV.	Total.
	£	£	£	£	£
Canada	27,894	569	—	—	28,463
British West Indies	1,653	10	—	—	1,663
<i>Total Empire</i>	29,547	579	—	—	30,126
United States of America... ..	22,782	9,660	20	—	32,462
GRAND TOTAL	52,329	10,239	20	—	62,588

(iii) *Principal Domestic Exports, 1933.*

	Article.	Quantity.	Total Value. £	Principal Countries of destination with amounts in £'000.
<i>Class I.</i>				
Vegetables—				
Potatoes		{ 9,511 barrels 17,592 crates 182 bags }	24,636	United States of America (20), Canada (3).
Onions		22,413 crates	4,482	Canada (4).
Other kinds		{ 90,856 „ 100 bags }	23,211	Canada (20), United States of America (3).
<i>Class II.</i>				
Cut Flowers		4,519 packages	5,020	United States of America (5).
Lily Bulbs		1,507 packages	4,910	United States of America (4).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	154,988	81,984	333,603	570,575
1930	510,496	545,091	898,981	1,954,568
1931	991,219	482,469	939,571	2,463,259
1932	717,213	487,887	686,426	1,891,526
1933	506,383	317,111	573,572	1,397,066

(ii) Imports by Classes, 1933.

From :—	Class I.	Class II.	Class III.	Class IV.	Total.
	£	£	£	£	£
United Kingdom	173,715	6,606	326,022	40	506,383
Canada	221,225	4,716	59,742	1,245	286,928
British West Indies	19,693	1,228	9,260	2	30,183
<i>Total Empire</i>	<u>414,633</u>	<u>12,550</u>	<u>395,024</u>	<u>1,287</u>	<u>823,494</u>
United States of America...	206,423	39,689	299,974	3,077	549,163
Other foreign countries	12,249	73	12,056	—	24,378
<i>Total foreign countries</i>	<u>218,672</u>	<u>39,762</u>	<u>312,030</u>	<u>3,077</u>	<u>573,541</u>
GRAND TOTAL	<u>633,305</u>	<u>52,312</u>	<u>707,054</u>	<u>4,364</u>	<u>1,397,035</u>

In addition there were imports of bullion and specie to the value of £31 from the United States of America.

(iii) Principal Imports, 1933.

Article.	Quantity.	Total Value.	Principal Countries of origin with amounts in £'000.
<i>Class I.</i>			
Meats—			
Fresh	18,714 cwt.	58,187	Canada (28), United States of America (25).
Preserved	—	19,799	United States of America (10).
Other	—	45,739	United States of America (29), Canada (8).
		<u>123,725</u>	
Beer, wines and spirits	—	101,884	United Kingdom (61), Canada (19).
Cattle Food (all kinds)	—	68,377	Canada (54), United States of America (8).
Fruit (all kinds)	—	44,298	United States of America (24).
Tobacco (all kinds)	—	35,654	United States of America (18), United Kingdom (13).
Vegetables (all kinds)	—	30,082	United States of America (15), Canada (12).
Butter and substitutes	814,615 lb.	28,447	United Kingdom (16), Canada (10).
Milk and cream (all kinds)	—	25,086	Canada (11), United States of America (7).
Wheat flour	28,269 cwt.	23,208	Canada (21).
<i>Class II.</i>			
Lumber	3,419,970 feet	36,004	United States of America (31), Canada (5).
<i>Class III.</i>			
Fancy goods	—	87,031	United Kingdom (47), United States of America (32), Canada (7).
Woollen manufactures	—	60,904	United Kingdom (56).
Oils (all kinds)	—	57,772	United States of America (46).
Cotton manufactures (all kinds)	—	53,040	United States of America (25), United Kingdom (22).
Hardware	—	49,319	United States of America (26), United Kingdom (19).
Electrical goods	—	39,425	United States of America (25), United Kingdom (10).
Furniture	—	32,098	United States of America (16), Canada (10).
Perfumery	—	27,875	United Kingdom (20).
Boots and Shoes	—	27,790	United Kingdom (17), United States of America (9).

V.—Natural Resources.

A.

1. AGRICULTURE.

Of the total area of the Colony only about 3,000 acres are capable of cultivation and less than 1,000 acres are actually under cultivation. From this land two or three crops annually are raised.

It is estimated that in 1933, 650 acres were under miscellaneous vegetables, 370 acres under potatoes, 80 acres under bananas, and 35 acres under lily bulbs (*Lilium Longiflorum Harrisii*).

Production is both for the domestic market and for export.

The following table shows the estimated quantity and value of the total agricultural production of the Colony during the last five years:—

Year.	Miscellaneous Vegetables.		Potatoes.		Bananas.		Lily Bulbs.		£
	Bushels.	£	Bushels.	£	Bunches.	£	Cases exported.	Bulbs replanted.	
1929 ...	306,500	58,200	185,000	80,000	81,000	30,000	5,864	1,172,800	9,700
1930 ...	302,000	89,000	134,000	57,000	81,000	25,000	5,740	1,000,000	23,400
1931 ...	190,000	42,000	75,000	26,000	72,000	26,000	4,270	1,400,000	10,300
1932 ...	240,000	78,000	75,000	26,000	72,000	22,500	3,009	1,000,000	6,500
1933 ...	200,000	52,525	74,000	23,000	75,000	19,000	2,014	1,000,000	7,000

The total value of agricultural production in 1933 was therefore estimated to be £101,525, while the value of agricultural produce exported was £36,525 (£24,800 to Canada, £960 to the United

Kingdom, £280 to the British West Indies, £10,430 to the United States of America, and £55 to other countries). The principal items were the following:—

	<i>Bushels.</i>
Celery	19,846
Potatoes	44,588
Onions	22,483
Carrots	26,005
Kale	9,294
Cabbage	12,896
Tomatoes	13,852
Beans, Beets, Cucumbers, Spinach and miscellaneous ...	4,778
	153,742

Changes in the Canadian tariff have resulted in attention being concentrated on the markets of that Dominion instead of those of the United States of America and increasing quantities of produce are now being sent to Canada.

There is still considerable opening locally for the Colony's products in meeting the requirements of the large hotels.

The Agricultural Department is energetically encouraging the vegetable and flower trade by the regulation of imports of seed, by testing new varieties, and by the operation of Government Central Packing Stations for tomatoes and other vegetables, where exports are graded. Local sales would be assisted by improved marketing organization and the provision of cold storage facilities. The erection of a pre-cooling plant in Hamilton is under consideration.

Agriculture is almost entirely in the hands of small farmers of European descent.

2. FORESTRY.

Considerable quantities of the cedar forest which originally covered the islands remain; but there is no commercial exploitation.

3. ANIMAL HUSBANDRY.

There are about 3,387 acres under pasture, and animals include 1,400 cattle, 1,500 horses, and 1,500 swine. 550,000 gallons of milk (value £76,000) 126,000 dozen eggs (£19,000), and 350,000 lb. of meat, chiefly pork (£8,500), were produced in 1933 for local consumption. There were no exports.

4. MINERALS.

There is no mineral wealth.

5. FISHERIES AND MARINE PRODUCTS.

A certain amount of fish is caught for local consumption.

B.

FOOD SUPPLY.

The income of the Colony is derived primarily from the tourist traffic and secondarily from the cultivation of early vegetables, etc., for the Canadian and United States markets. It is accordingly necessary to import the greater part of the food supply. Actual imports of food were valued at over £423,075 in 1933, and included imports even of such articles as were produced locally in fairly large quantities, e.g., potatoes, vegetables, poultry, and eggs. Much the greater part of these imports are, of course, required for the visitors to the Colony or for the supply of His Majesty's ships in the Atlantic Station. The permanent population may be much more nearly self-supporting in food. It could not, however, become entirely so without upsetting its present economic basis.

VI.—Industry.

There are no industrial establishments other than a perfume factory, a few small boat-building stations, and the naval dockyard at St. George.

VII.—Other Economic Activities.

There is no entrepôt trade, but catering for tourists is by far the most important economic activity of the Colony. The great bulk of these come from the United States of America, and the majority in the winter, although summer visitors are increasing. In 1933, 40,000 tourists visited the island (exclusive of 22,000 in cruise ships) staying an average period of 10 days. The following table shows total arrivals of tourists in the Colony during the last five years:—

<i>Year.</i>	<i>Arrivals by regular steamers.</i>	<i>Arrivals by Cruise ships.</i>	<i>Total.</i>
1929	40,974	5,172	46,146
1930	46,875	6,747	53,622
1931	49,322	25,962	75,284
1932	47,344	29,324	76,668
1933	40,883	22,096	62,979

Any estimate of the income derived from this source is difficult but it is estimated that the average tourist spends not less than £2 a day (a minimum expenditure of £800,000 on the above figures) and that 80 per cent. of the Colony's revenue is derived from tourists. Another estimate may be obtained from the visible balance of trade. In 1933 exports of local products were £62,588 and imports £1,397,066. Tourist expenditure was no doubt the principal item off-setting this apparent "unfavourable" balance of £1,334,478.

A Trade Development Board of unofficial persons appointed by the Governor has been set up to encourage and manage the tourist traffic. It has carried on an extensive programme of advertising in the United Kingdom, Canada, and the United States of America and has assisted in the provision of local entertainment for visitors. In 1933 its total expenditure was £62,328, including steamer subsidies, and £19,322 was spent in advertising in the United States of America, Canada and the United Kingdom.

Another source of income not shown in the ordinary trade and production figures is that derived from the naval and military expenditure in the Colony. Bermuda is the headquarters of the West Indies and Atlantic Squadron and the site of a naval dockyard, to defend which a small garrison is maintained.

VIII.—Communications.

(i) INTERNAL.

There are roads throughout the Colony, with a total mileage of 105 miles, but traffic, other than pedestrian and bicycles, is entirely horse-drawn, as no motors are allowed. A light standard gauge railway, 22 miles long, opened in November, 1931, connects both ends of the main Islands with Hamilton.

(ii) EXTERNAL.

The principal shipping services are:—

(a) with New York: Furness Bermuda Line, bi-weekly during most of the year (in receipt of a subsidy from the Colonial Government of £25,000 per annum); Munson Line, weekly;

(b) with Canada: Canadian National Steamships, twice in each fortnight (in receipt of subsidy from the Colonial Government);

(c) with the United Kingdom: Pacific Steam Navigation Company, monthly; Elders and Fyffes, occasional; and Royal Mail Steam Packet Company, cargo only, tri-weekly;

(d) with the British West Indies: Canadian National Steamships; Royal Mail Steam Packet Company; and Elders and Fyffes.

There are two ports of entry in the Colony, Hamilton, the capital, and St. George. Large quantities of shipping enter at these ports (about three-quarters of it at Hamilton).

In 1933, six sailing vessels (two British and four United States) with a total tonnage of 3,946 net tons entered and the steam vessels shown in the table below:—

Country of registration.	Number of vessels.	Net tonnage.
British	359	2,480,746
United States of America	67	516,992
German	13	102,897
Norwegian	24	40,214
Other	25	178,815
	<u>488</u>	<u>3,319,664</u>

Both Hamilton and St. George are well-sheltered harbours with ample wharfage accommodation. At Hamilton vessels up to 600 feet long and 25 feet draught can come alongside and at St. George's vessels up to 430 feet long and 22 feet draught.

IX.—Tariff.

Import duties are levied on all goods not specially exempted. A number of specific or special *ad valorem* rates are prescribed for various classes of goods; all other goods not exempt from duty are dutiable at the rate of 10 per cent. *ad valorem*.

Imperial preference is provided on all dutiable goods by (i) the provision in a few cases of special higher rates of duty for foreign goods, and (ii) the imposition of a surtax of one-quarter of the duty on all dutiable foreign goods. Empire goods are exempt from the surtax except in the case of liquors and tobacco, on which a lesser surtax of 22½ per cent. is payable. Goods of foreign origin imported for Government use are liable for duty.

X.—Trade Representatives, etc.

The West India Committee act as unofficial trade representatives in London and the Colony shares in the cost of maintaining the West Indian Trade Commissioner in Canada. Representatives from the Colony also visit Canada during the main export season for vegetables.

BRITISH GUIANA.

I.—Situation, etc.

British Guiana lies between latitude 1° and 9° North and longitude 57° and 61° West. It has a seaboard of roughly 270 miles, extending from near the mouth of the Orinoco River on the west to the Courantyne River on the east. The Colony is bounded on the north by the Atlantic Ocean, on the south and south-west by Brazil, on the east by the Dutch Colony of Surinam, and on the west by Venezuela.

The total area is 57,266,874 acres, or about 89,500 square miles; the Colony is therefore slightly larger than Great Britain. It may be divided into three natural areas; a strip of flat and swampy alluvium along the coast and some way up the main rivers; a central area of tropical forest occupying about 87 per cent. of the total area of the Colony; and a region of elevated savannahs in the extreme south. Practically the whole permanent settlement is in the narrow coastal strip, generally less than 10 miles wide, between the sea and the undrained swamps bordering the forest area. Much of this strip is below sea level, and it is kept drained by an elaborate system of canals, polders, and pumps. Only about 182,646 acres, or 0·3 per cent. of the total area, is under cultivation. Some 3,248,000 acres have been alienated under firm title.

The Colony is well watered. Several large rivers run through the higher land in or to the south of the forest area to the sea. The most important are the Essequibo, Demerara, and Berbice, whose respective basins form the three counties of the Colony. The Essequibo is by far the largest, running from the extreme southern boundary, and with its tributaries, the Mazaruni and Cuyuni, draining the greater part of the Colony. The Demerara, the shortest of the three, is economically the most important at present. The Courantyne River, which forms the eastern boundary, is also of importance. All these rivers are free from falls in their lower courses, and are navigable for considerable distances.

The climate is a naturally healthy one for the tropics. On the coast there are two wet seasons and two dry; in the interior the difference in the seasons is less marked. Rainfall on the coast averages about 88 inches per annum, but it is variable, and droughts sometimes occur. The mean maximum temperature ranges from 83° F. to 87° F. and the mean minimum from 74·5° F. to 76·5° F. The heat is tempered by constant sea breezes. The mean shade temperature at Georgetown during 1933 was 80·4° F. which is equal to the average from 1846-1932. The total rainfall, which was well distributed during the year was 116·55 inches. For the months of May, June, August, October, November and December, the totals were 14·34, 12·56, 14·45, 4·12, 10·40, and 27·10 inches, or 3·25, ·95, 8·00, 1·51, 4·92 and 15·33 inches respectively higher than the average. The total for December was the highest since 1891, when there was a record fall of 32·38 inches.

II.—Population.

The estimated population at 31st December, 1933, was 321,260, made up as follows:—

Europeans, other than those of Portuguese origin.	2,051	Aborigines	...	...	...	8,557
Europeans of Portuguese origin	...	Blacks	...	...	...	127,103
East Indians	...	Mixed races	...	...	...	36,368
Chinese	...	Other races and races not stated	...	...	...	333
	...					
	...					
	...					
	...					
	...					
	...					

The population has increased from 296,041 in 1911 to 297,691 in 1921, and to 310,933 at the Census in 1931. There was an increase of 3,447 during 1933.

The only large town is Georgetown, the capital and chief port, lying at the mouth of the Demerara River, which has a population of 64,000. New Amsterdam, at the mouth of the Berbice River, has a population of 9,000.

There is at present no substantial immigration or emigration. East Indian immigration, formerly organized on an indentured labour basis, ceased in 1917 and in 1931 immigrants, i.e., persons born outside the Colony, formed only 12 per cent. of the total population.

III.—Finance.

A.—CURRENCY AND BANKING.

1. Accounts are kept in dollars and cents, the dollar being the equivalent of 4s. 2d. British sterling and United States gold coin are current and are legal tender. Government currency notes of the face value of \$1 and \$2 are also legal tender.

2. Barclays Bank (Dominion, Colonial, and Overseas) and the Royal Bank of Canada have establishments of Georgetown with branches at New Amsterdam, Berbice. The Post Office also carries on Savings Bank business. The number of depositors at the close of 1933 was 36,799 and the total amount deposited £363,185. There are 27 co-operative credit banks.

B.—PUBLIC FINANCE.

1. The Public Debt at 31st December, 1933, excluding loans received from the Colonial Development Fund, amounted to £4,622,404, against which Sinking funds were held valued at £793,628. (See summary below.)

2 (A).—*Analysis of Revenue (on the Basis of the Estimates for the year ended 31st December, 1934).*

Self-balancing Departments.

	Revenue.	Expenditure.
	\$	\$
Post Office, Telegraphs, and Telephones	181,402	242,343
Wireless	8,000	26,025
Transport and Harbours Department	670,000	800,977
	859,402	1,069,345

Net Deficit \$209,943.

General Revenue.

		\$	Percentage.
1. Customs		2,458,000	55.4
2. Excise and Licences		975,420	22.0
3. Internal Revenue—			
Income-tax	300,000		
Other	97,830		
		397,830	9.0
4. Fees of Court or Office, etc.		181,602	4.1
5. Rents and other income from lands, forests and mines		111,013	2.5
6. Interest		261,000	5.8
7. Miscellaneous		54,202	1.2
* Equivalent to £924,806		4,439,067*	100.0
Revenue of self-balancing Departments set-off against Expenditure		859,402	
		<u>\$5,298,469</u>	

2 (B).—*Analysis of Import Duties for 1933.**Amount of duty collected on articles imported from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	\$	\$	\$	\$
Class I	696,802	196,124	305,964	1,198,890
Class II	5,826	5,386	7,624	18,836
Class III	393,495	377,656	261,472	1,032,623
Class IV	41	16	789	846
Class V	—	—	22	22
	<u>1,096,164</u>	<u>579,182</u>	<u>575,871</u>	<u>2,251,217</u>

3.—*Analysis of Expenditure (on the basis of the Estimates for the year ended 31st December, 1934).*

		\$	Percentage.
1. Debt Charges		1,179,627	26.6
2. Administration		1,247,420	28.2
3. Economic Development		45,798	1.3
4. Social Services—			
Medical	537,416		
Education	427,191		
Others	310,171		
		1,274,778	28.8
5. Defence		25,193	0.5
6. Non-effective, i.e., Pensions		439,642	9.9
7. Deficit on self-balancing Departments. (See under 2(A) Revenue)		209,943	4.7
† Equivalent to £921,334... ..		4,422,401†	100.0
Expenditure of self-balancing Departments set-off against Revenue		859,402	
		<u>\$5,281,803</u>	

4. The Colony possesses no Reserve Fund or other realizable assets. The only important Colonial funds are the Colonization Fund and the Immigration Fund (Amalgamated) which amounted to \$813,673 and \$430,163 respectively at the 31st December, 1933. These funds were established by legislation for the purpose of financing colonization and the return of East Indians, who came originally to the Colony under indenture.

5. The following assistance has been received from the Imperial Exchequer:—

	Estimate. £	Issues. £	Grant. £	Loan. £
(a) <i>In aid of expenses of Administration.</i>				
1930-31	50,000	50,000	—	50,000
1931-32	220,000	220,000	—	220,000
1932-33	120,000	120,000	—	120,000
1933-34	64,000§	—	—	—
(b) <i>In relief of unemployment—</i>				
1930-31	112,000	60,906	53,618	7,288†
1931-32	115,000	109,554	76,959	32,595†
1932-33	72,000	56,035	56,035	—
1933-34	36,000	35,375	35,375	64,000§

† Loans to Sugar Estates.

§ Transferred from (a) to increase provision of £36,000 under (b) to £100,000 for Unemployment and Flood Relief.

6. The following grants to the Government of British Guiana from the Empire Marketing Fund have been approved:—

(a) £200 per annum for 5 years from 1930 for the collection and investigation of plants possessing insecticidal properties with a view to their cultivation and commercial exploitation.

(b) £1,000 in aid of sugar research in the year 1931-32.

(c) £1,125 in aid of sugar research, to 30th September, 1933.

Grants and loans from the Colonial Development Fund have been approved in respect of the following schemes:—

	£
Visit of Sanitary Expert	1,000 (grant)
Investigation of moth-borer pest in sugar-cane	2,475 (grant)
Improvement of rice cultivation	4,250 (grant)
	800 (loan)
Purchase of rice machinery	1,926 (grant)
Improvement of water supply in coastal villages	20,000 (grant)
Establishment of health centre in Georgetown	500 (grant)
Provision of pumps for drainage of swamp lands near Georgetown ...	1,800 (grant)
Training of Forest Utilization Officer	505 (grant)
Construction of Bartica-Potaro Road	63,249 (loan)
Construction of branch-road to Tumatumari Falls	1,042 (loan)
Construction of road to Tiboku Falls	36,458 (loan)
Purchase of lorries	3,000 (grant)
	3,350 (loan)
Carry-out of Geological Survey in neighbourhood of road	8,298 (loan)
Sugar Cane Research	1,800 (grant)

Summary of Public Debt at 31st December, 1933.

Year of loan.	Amount outstanding at 31-12-33.			Rate of interest.	Annual interest provision.			Annual sinking fund provision.			Sinking fund at 31-12-33*.			Remarks.
	£	s.	d.	Per cent.	£	s.	d.	£	s.	d.	£	s.	d.	
1886 ...	194,500	0	0	4	7,780	0	0	1,945	0	0	215,325	19	2	Loans issued in separate fractions are grouped with reference to the Ordinance under which they were issued.
1898 ...	250,000	0	0	3	7,500	0	0	2,500	0	0	201,157	8	2	
1900 and later.	236,545	0	0	various	9,524	6	0	1,549	7	6	79,001	16	9	
1916 and later.	1,693,375	0	0	various	85,605	15	0	8,377	10	0	207,897	3	0½	Raised by conversion of existing bonds between 1900 and 1915 at 3½ per cent., 3½ per cent., 4 per cent., and 4½ per cent.
1921 ...	133,210	8	4	5	6,660	12	6	3,207	14	2	68,825	5	5½	Raised at various dates between 1916 and 1929 for various periods between 5 and 50 years at 5 per cent., 5½ per cent., and 6 per cent. The largest individual part is £1,000,000 at 5½ per cent. repayable in 1972.
1929 ...	2,090,000	0	0	5	104,500	0	0	20,900	0	0	21,420	5	4½	
1933 ...	25,773	3	11	3	773	3	11	—	—	—	—	—	—	
	4,622,403	12	3		222,341	17	5	38,479	11	8	793,627	17	11½	Sinking fund contributions commenced in 1933.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	\$	\$	\$	\$
1913	5,129,040	4,437,887	960,049	10,526,976
1930	3,246,398	5,387,049	2,034,058	10,667,505
1931	3,040,212	4,737,043	1,872,965	9,650,220
1932	4,836,716	4,032,350	1,722,084	10,591,150†
Equivalent to ...	£1,007,649	£840,073	£358,768	£2,206,490
1933	5,820,147	2,914,022	1,225,820	9,959,989†
Equivalent to ...	£1,212,531	£607,088	£225,379	£2,074,998

* Mean market value.

† Excluding exports for Ships' Stores as follows:—

1932	\$11,576 equivalent to	£2,399
1933	\$12,923	£2,692

(ii) *Domestic Exports by Classes, 1933.*

From :—						Total
	Class I.	Class II.	Class III.	Class IV.	Class V.	Merchandise.
	\$	\$	\$	\$	\$	\$
United Kingdom ...	4,654,913	474,792	51,441	35	601,552	5,782,733
Canada ...	1,816,350	185	130	—	—	1,816,665
British West Indies ...	843,877	112,409	9,895	1,096	—	967,277
Rest of Empire ...	28,121	4,408	26	—	—	32,555
<i>Total Empire</i> ...	<i>7,343,261</i>	<i>591,794</i>	<i>61,492</i>	<i>1,131</i>	<i>601,552</i>	<i>8,599,230</i>
United States of America ...	21,844	269,825	13,833	18	30,728	336,248
Belgium ...	—	286,058	5	—	494	286,557
French West Indies ...	210,674	60	—	—	—	210,734
Holland ...	37,560	59,643	—	—	—	97,203
Other foreign countries ...	144,295	8,530	2,970	360	473	157,628
<i>Total foreign countries</i> ...	<i>414,373</i>	<i>624,116</i>	<i>16,808</i>	<i>378</i>	<i>31,695</i>	<i>1,087,370</i>
Ships' Stores ...	2,053	260	130	—	—	2,443
GRAND TOTAL ...	7,759,687	1,216,170	78,430	1,509	633,247	9,689,043
Equivalent to ...	£1,616,602	£253,369	£16,340	£314	£131,926	£2,018,551

(iii) *Principal Domestic Exports, 1933.*

Class I.	Article.	Quantity.	Total Value.	Principal Countries of destination with amounts in \$'000.
			\$	
	Sugar, unrefined ...	127,083 tons	5,745,151	United Kingdom (4,109), Canada (1,623), British West Indies (10).
	Rice ...	29,120 tons	1,062,470	British West Indies (788), French West Indies (210), French Guiana (18), United States of America (16), Haiti (8).
	Molasses ...	8,137,233 gal.	421,706	United Kingdom (270), Canada (138).
	Rum ...	883,019 pf. gal.	383,262	United Kingdom (268), St. Pierre Miquelon (65).
	Coffee, raw ...	10,207 cwt.	79,594	Canada (31), Holland (27), Norway (11), British West Indies (7).
Class II.				
	Diamonds ...	50,904 carats	551,948	Belgium (286), United Kingdom (254), United States of America (6), Holland (5).
	Bauxite ...	35,916 tons	263,953	United States of America (258).
	Wood and Timber—			
	Timber ...	184,489 c. feet	121,510	Holland (56), United Kingdom (48), British West Indies (14).
	Lumber ...	163,083 feet	11,581	British West Indies (8).
	Other ...	—	48,261	British West Indies (43).
			181,352	
	Balata ...	479,573 lb.	127,529	United Kingdom (118), Norway (6), United States of America (3).
Class V.				
	Raw Gold ...	27,075 oz.	633,247	United Kingdom (602), United States of America (31).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	\$	\$	\$	\$
1913 ...	4,353,822	1,174,824	2,206,216	7,734,862
1930 ...	5,427,187	2,172,035	1,866,220	9,465,442
1931 ...	4,487,345	1,713,710	1,455,930	7,656,985
1932 ...	5,175,736	1,633,531	1,307,011	8,116,278
Equivalent to ...	£1,078,278	£ 340,319	£272,294	£1,690,891
1933 ...	5,355,465	1,819,641	1,472,890	8,647,996
Equivalent to ...	£1,115,722	£379,092	£306,852	£1,801,666

(ii) *Imports by Classes, 1933.*

From—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	\$	\$	\$	\$	\$
United Kingdom ...	1,494,168	41,047	3,817,430	620	5,353,265
Canada ...	701,543	63,514	312,590	402	1,078,049
British West Indies ...	34,954	37,711	344,952	369	417,986
British East Indies ...	70,718	—	187,172	—	257,890
Rest of Empire ...	24,500	14	41,129	—	65,643
<i>Total Empire</i> ...	<i>2,325,883</i>	<i>142,286</i>	<i>4,703,273</i>	<i>1,391</i>	<i>7,172,833</i>

(ii) Imports by Classes, 1933—cont.

	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
From—	\$	\$	\$	\$	\$
United States of America...	146,484	34,613	341,297	24,911	547,305
Japan	1,026	—	368,919	—	369,945
Holland	98,920	350	72,556	—	171,826
Germany	1,173	—	124,788	—	125,961
France	19,245	968	34,494	—	54,707
Other foreign countries ...	77,169	5,771	119,433	48	202,421
<i>Total foreign countries</i> ...	<i>344,017</i>	<i>41,702</i>	<i>1,061,487</i>	<i>24,959</i>	<i>1,472,165</i>
GRAND TOTAL	2,669,900	183,988	5,764,760	26,350	8,644,998
Equivalent to	£556,229	£38,331	£1,200,992	£5,489	£1,801,041

In addition there were imports of bullion and specie to the value of \$2,998 equivalent to £625.

(iii) Principal Imports, 1933.

Class I.	Article.	Quantity.	Total Value. \$	Principal Countries of consignment with amounts in \$'000.
Grain, Flour, Pulse, etc.—				
	Flour, wheat	179,422 bags	740,386	United Kingdom (420), Canada (320).
	Beans, Peas, etc.	23,391 cwt.	74,874	United Kingdom (69), Dutch Guiana (3).
	Oats	21,366 „	40,829	Canada (34), United Kingdom (6).
	Dholl	13,181 „	40,470	India (37), United Kingdom (3).
	Barley	3,046 „	8,867	Holland (8).
	Corn Meal	2,387 bags	8,698	United Kingdom (5), Canada (2), United States of America (1).
	Other kinds	5,154 cwt.	26,176	Canada (9), United Kingdom (8), Straits Settlements (6).
			940,300	
Fish—				
	Canned or preserved	5,695 cwt.	44,019	Canada (27), United States of America (7), United Kingdom (7).
	Pickled	4,084 barrels	27,249	Canada (26).
	Other kinds	34,570 cwt.	179,155	United Kingdom (119), Canada (51).
			250,423	
Tobacco—				
Manufactured—				
	Cigarettes	45,748 lb.	57,840	United Kingdom (57).
	Other kinds	99,217 „	138,338	United Kingdom (136), British West Indies (2).
	Unmanufactured	273,795 „	37,343	United States of America (36), United Kingdom (1).
		418,760 „	233,521	
Vegetables—				
Fresh—				
	Potatoes	67,891 cwt.	126,498	Canada (91), Holland (18), British West Indies (11), United Kingdom (5).
	Onions	14,938 „	39,631	Portuguese Possessions (15), Canada (10), Holland (8), United Kingdom (3), Egypt (2)
	Garlic	2,395 „	12,904	Holland (8), United States of America (2).
	Other	2,788 „	10,063	Canada (8).
	Dried, canned, etc.	936 „	10,286	Portugal (4), United Kingdom (2), Hong Kong (1), Holland (1).
		88,948	199,392	
Meats—				
	Beef and Pork, pickled or salted	10,734 barrels	157,040	United States of America (60), United Kingdom (60), Argentine (18), Canada (17).
	Canned	69,271 lb.	11,814	Argentine (4), United Kingdom (2), United States of America (2), Canada (1).
	Fresh, including poultry, etc.	21,701 „	3,232	United Kingdom (2).
	Other kinds	113,942 „	24,865	United States of America (10), United Kingdom (8), Canada (6).
			196,951	

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>				<i>Quantity.</i>	<i>Total Value.</i> \$	<i>Principal Countries of consignment with amounts in \$'000.</i>
<i>Class I—(contd.)</i>						
Butter and substitutes—						
Butter	...	...	...	482,863 lb.	108,107	United Kingdom (90), Canada (11), Australia (2), France (2).
Ghee	...	...	...	15,802 „	3,263	India (all).
Phal Kagi	...	...	...	76,390 „	8,504	India (8).
Butter substitutes	...	...	...	207,612 „	30,932	Holland (18), United Kingdom (12).
				782,667 „	150,806	
Beer, ale, etc.	...	...	...	120,412 gal.	106,106	United Kingdom (104).
<i>Class II.</i>						
Wood and Timber—						
Unmanufactured—						
Lumber	...	...	...	1,911,782 sup. ft.	88,325	Canada (61), United States of America (27).
Timber	...	...	...	—	257	
					88,582	
<i>Class III.</i>						
Cotton manufactures—						
Piece Goods	...	...	...	10,966,699 sq. yd.	766,795	United Kingdom (611), Japan (98), United States of America (57).
Hosiery	...	...	...	72,210 pr.	7,513	United Kingdom (6), Hong Kong (1).
Other kinds	...	...	...	—	134,801	United Kingdom (74), British West Indies (44).
					909,109	
Machinery and parts—						
Sugar	...	...	...	—	333,068	United Kingdom (310), United States of America (20).
Agricultural	...	...	...	—	92,384	United Kingdom (60), Holland (28).
Railway and Tramway	...	...	...	—	85,430	United Kingdom (84).
Electrical	...	...	...	—	28,598	United Kingdom (20), United States of America (6), Canada (2).
Mining	...	...	...	—	5,787	United Kingdom (4), United States of America (1).
Other kinds	...	...	...	—	117,512	United Kingdom (86), United States of America (19), Germany (6).
Parts and accessories	...	...	...	—	57,182	United Kingdom (51), United States of America (3), Canada (2).
					719,961	
Manures	...	...	...	15,367 tons	382,642	United Kingdom (277), British West Indies (43), Belgium (28), Holland (15), Canada (12).
Artificial Silk Manufactures—						
Piece-goods	...	...	...	2,171,933 yd.	234,428	Japan (172), United Kingdom (36), France (18).
Hosiery	...	...	...	162,228 pr.	23,224	United Kingdom (18), Canada (3), Hong Kong (2).
Other kinds	...	...	...	—	25,324	United Kingdom (16), Japan (5), Switzerland (2), British West Indies (1).
					282,976	
Bags and Sacks	...	...	...	194,776 doz.	274,211	India (178), United Kingdom (76), British West Indies (17), Canada (3).
Boots and Shoes	...	...	...	22,830 doz. pr.	226,502	United Kingdom (169), Straits Settlements (24), Czechoslovakia (9), Hong Kong (8), Canada (7), Japan (5).
Oils—						
Motor Spirit	...	...	...	765,942 gal.	108,400	British West Indies (99), United States of America (9).
Illuminating	...	...	...	427,203 „	65,422	British West Indies (57), Canada (5), United States of America (3).
Fuel	...	...	...	489,845 „	39,962	British West Indies (39).
				1,682,990 „	213,784	
Iron and Steel Manufactures—						
Galvanized bars, rods, sheets or corrugated	...	...	...	23,809 cwt.	83,971	United Kingdom (all).
Other kinds	...	...	...	—	123,312	United Kingdom (112), Canada (9), United States of America (3), Belgium (1).
					212,283	

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i> <i>Class III—(contd.)—</i>	<i>Quantity.</i>	<i>Total Value.</i> \$	<i>Principal Countries of destination with amounts</i> <i>in \$'000.</i>
Motor Cars, lorries, etc., and parts—			
Motor Cars, lorries, etc. ...	230	150,921	United Kingdom (124), Canada (26).
Motor Car, etc., parts ...	—	25,153	United Kingdom (14), United States of America (6), Canada (4).
		176,074	
Hardware (all kinds) ...	—	154,942	United Kingdom (99), Germany (26), Canada (13), United States of America (12).
Paper Manufactures ...	—	143,499	United Kingdom (89), Holland (16), Canada (11), Sweden (7), France (7), Denmark (4), Germany (3), United States of America (2), Norway (2).
Wood and Timber Manufactures ...	—	139,429	Canada (89), United States of America (32), United Kingdom (5).
Woollen Manufactures ...	—	137,851	United Kingdom (137).
Medicines and Drugs... ..	—	126,711	United Kingdom (75), United States of America (24), Canada (21), Germany (4).
Apparel	—	122,865	United Kingdom (62), Japan (43), United States of America (10), Canada (5).
Soap (all kinds)	1,640,313 lb.	109,718	United Kingdom (102), United States of America (5), Canada (2).
Hats and Caps, etc.	—	101,866	United Kingdom (71), Italy (21), Japan (6), India (1).
Chemicals	—	89,236	United Kingdom (70).
Implements and Tools—			
Agricultural	—	19,160	United Kingdom (16) Canada (3).
Other kinds	—	65,210	United Kingdom (49), United States of America (11), Germany (3).
		84,370	

V.—Natural Resources.

A.

Development has been concentrated in the past in the coastal strip and agriculture is practically confined to it. Hopes have been raised at various times of agricultural development in the interior, but attempts at such development have met with little success and the information available as to the soils of the hinterland indicates that they are generally unsuitable for agriculture. The interior possesses, however, considerable forestry and mineral resources which have been developed to some extent and there are possibilities of developing the manufacture of wood-pulp, the production of water power and cattle-raising.

1. AGRICULTURE.

Sugar has for over a century been the principal product of the Colony, and now supplies, with its by-products, approximately two-thirds by value of the total exports. In 1933, 63,093 acres were under cane cultivation; the area reaped was 55,811 acres yielding 141,956 tons. Exports were 127,083 tons, valued at £1,196,906. In addition, 8,137,233 gallons of molasses, valued at £87,855, and 893,019 gallons of rum, valued at £19,846, were exported. The cultivation of sugar is now practically confined to Demerara and Berbice, all the estates in Essequibo except one having abandoned sugar in favour of rice. Cultivation is almost entirely in the hands of large estates controlled from the United Kingdom, but a few small cane farmers exist, and it is considered that there is room for the encouragement of cane farming particularly by the West Indian population. The area under farmers' canes in the Colony during 1933 was 1,525 acres yielding 2,328 tons of sugar.

Cultivation methods are in general efficient, and the average yield of sugar in 1933 was 2.54 tons per acre reaped (compared with 1.97 tons sugar for the period 1925-1928). The use of mechanical tillage has grown recently, and of late years the practice of flood fallowing, i.e., leaving the land under water for a period of not less than six months, has been found to give valuable results in improving the fertility and physical texture of the soil and destroying pests. Flooding is done before replanting, which is only undertaken every few years, as from three to five ratoon crops are usually taken from the canes.

There are some twenty factories, each associated with a particular estate or group of estates. Most of them are a fair size, and they reach a high standard of efficiency, which is encouraged by the interchange of the technical returns of the factories.

The principal pest of sugar-cane in the Colony is the small moth-borer. A special investigation in connexion with the biological control of this pest has been undertaken by the collaboration of the Imperial Bureau of Entomology, the Colonial Development Fund, the British Guiana Sugar Producers' Association, and the Department of Agriculture. A parasite, the Amazon fly (*Metagonistylum minense*), has been successfully introduced from the Amazon region, liberated and recovered in the field on several estates. The ultimate effect on the control of this pest is awaited with anticipation. Other research work is undertaken by the Sugar Research Station maintained jointly by the industry and the Colonial Government. This station carries out special cane-breeding work, as special varieties are needed to suit the peculiar conditions of the Colony. A large number of cane crosses, involving both local and introduced canes were made during the

year and over 15,000 seedlings were bred for trial. Included in these were a number of progeny from the inter-generic cross *Saccharum* x *Sorghum*. Numerous variety and manurial trials with sugar-cane were reaped and others started during the year. It is now fairly well established that the varieties Diamond 10 and P.O.J. 2878 are superior to the standard cane D. 625, and they are both being rapidly extended by the sugar estates, while certain varieties bred during the period 1928-1930 are showing very great promise.

For the experiments reaped to date, it is clear that 2 cwt. of sulphate of ammonia is the optimum dose for plant canes on flooded frontland soils. There are strong indications that this dose may be profitably increased when treating ratoons on frontland and both plants and ratoons on pegasse areas, but further confirmation of these points is needed. Despite the acidity of the sugar soils, applications of lime or limestone have not produced marked increases in yield.

The consistently falling prices of sugar have operated adversely against the acreage under cultivation and there has been a definite trend to abandon areas not highly productive. The effect of this is that the acreage in 1930-1933 was approximately 12 per cent. less than in 1910-1913. Such advances have, however, been made in the yield per acre that the total exports were, in 1930-1933, approximately 37 per cent. above those in 1910-1913. It would be possible both to bring back under sugar land which has been abandoned and to develop new land in the coastal strip. Such expansion does not at present appear desirable on account of world conditions. Nevertheless, there is no doubt that sugar must continue for many years to be the economic mainstay of the Colony.

Most of the sugar produced is raw sugar polarizing about 96°, but one or two factories concentrate on the production of "yellow crystals" for direct consumption. Some others devote considerable attention to the production of rum, of which the average exports in 1929-1933 were 841,282 gallons. A small quantity of industrial alcohol is also produced.

The following table gives the figures for production and exports of sugar and its by-products for the five-year period 1929-1933:—

Year.	Production.		Sugar.		Exports.		Rum.	
	Sugar.	Rum.	Sugar.		Molasses.			
	Quantity in tons.	Quantity in gal.	Quantity in tons.	Value in £	Quantity in gal.	Value in £	Quantity in gal.	Value in £
1929	117,254	1,838,353	100,449	1,238,289	2,536,623	29,417	1,109,482	102,391
1930	127,764	1,571,371	114,542	1,128,934	3,851,337	41,345	846,319	75,619
1931	126,143	1,002,267	119,346	1,109,532	7,106,997	76,945	722,076	70,759
1932	148,634	840,617	137,078	1,342,191	7,554,520	80,790	645,511	59,742
1933	141,956	1,239,355	127,083	1,196,906	8,137,233	87,855	883,019	79,846

Rice is the second crop of the Colony, and has developed remarkably in the past twenty years. Between 1927 and 1933 exports increased in quantity from 11,497 tons to 29,120 tons, and in value from £150,806 to £221,348. Rice has almost entirely replaced sugar on the coastal areas of Essequibo, and is also largely grown in Berbice. The industry has inherited from the sugar estates extensive drainage and irrigation systems, and it is doubtful whether it could itself pay interest on large expenditure for such works or meet high recurrent expenditure for them. There are in all nearly 200 rice-mills in operation, most of them small, and during the year legislation was enacted to improve milling conditions in the industry and to fix standard weights for the sale and purchase of rice. In 1933 there were 72,161 acres under rice, but including the second or spring crop, the area actually reaped was 87,125 acres. The total yield of padi was 63,524 tons, equivalent to 38,154 tons of cleaned rice. The principal export markets are the West Indian Islands, Trinidad taking the higher, and Barbados and the northern islands taking the lower grades. There is also a market in Canada for the highest grades and white rice, and for paddy required by the Canadian mills. Attempts have also been made at various times to develop an export to Venezuela, but this is at present hindered by high customs duties in that country.

With assistance from the Colonial Development Fund, machinery has been introduced for threshing and experimental milling of white rice and barns have been erected for the storage of pure line padi required for seed distribution purposes. The grant also covered the salary of a Plant Breeder and investigations are being continued on the improvement of padi varieties; manurial and cultural experiments are also receiving attention. The variety No. 79, recently evolved by the Department of Agriculture, has proved superior to other standard varieties both in yield and in ability to withstand adverse conditions. Pure line seed distribution has been placed on a well-organized basis, adequate selected seed being now available in rice-growing districts. An indication of the high standard of quality reached by British Guiana rice is the fact that five prizes were awarded to this Colony for commercial samples at the World's Grain Exhibition held at Regina, Canada, during 1933.

As the local market is already fully satisfied, the progress of the rice industry in the Colony depends on the maintenance of the quality of the exports. Confidence on the export markets was increased by the inauguration, in 1930, of Government grading of all British Guiana rice for export; the grading legislation was modified during 1933 to comply with the requirements of the trade. The whole question of the marketing of rice has been under investigation and, as a preliminary to the formation of a Rice Exporters Association, a Marketing Board has been set up by the Government of the Colony. This Board works in close co-operation with the Department of Agriculture and the trade.

The following table gives the production and exports of milled rice from British Guiana for the five-year period 1929-1933:—

Year.	Production		Exports.	
	Quantity in tons.	Value in £	Quantity in tons.	Value in £
1929	43,257	14,091	14,091	182,585
1930	38,551	22,480	22,480	227,163
1931	47,054	23,632	23,632	220,904
1932	50,869	28,541	28,541	247,474
1933	38,154	29,120	29,120	221,348

Coconuts are established on 23,452 acres of land.

Many areas under coconut cultivation are unsuitable in soil condition. The exports of copra have declined considerably lately, due mainly to increased local consumption of coconut products. During 1933, local enterprise established and equipped an up-to-date factory for the production of high grade edible oil from coconuts. At the end of the year, duties on imported edible oils were increased with the object of protecting the local manufacturer and thereby giving a better return to the coconut grower. World prices for oils have, however, fallen so consistently, that despite the increased sale of coconuts and coconut products on the local protected market, sale prices to the grower reached new low levels. The following table gives the exports of coconuts and coconut products for the five-year period 1929-1933:

Year.	Nuts.		Copra.		Oil.	
	Quantity No.	Value in £	Quantity in tons.	Value in £	Quantity in gal.	Value in £
1929	637,812	2,211	3,760	65,490	20,862	3,485
1930	629,371	1,634	2,010	29,880	26,377	3,346
1931	1,494,195	2,820	1,381	17,214	20,742	1,928
1932	962,364	2,184	757	10,195	19,048	2,133
1933	1,698,175	4,776	921	8,551	20,198	1,855

The area under **coffee** in 1933 was 4,630 acres. The area is capable of extension, notably in the North West and Pomeroon Districts. The difficulty is to find markets, as the species grown in British Guiana is *Liberica*, and this is only in demand in the Scandinavian countries and to a limited extent in the United States of America and Canada. It is possible that the Canadian market might expand somewhat, but it cannot be relied upon for the absorption of large quantities of this class of coffee when supplies of other low-priced coffees are steadily increasing.

The following table gives the exports of coffee for the period 1929-1933:—

Year.	Exports.	
	Quantity in cwt.	Value in £.
1929	8,098	21,695
1930	3,280	4,666
1931	7,102	6,996
1932	9,415	14,468
1933	10,207	16,582

Citrus is successfully cultivated in the North West District and other high and well-drained areas of the Colony, particularly in the riparian district; the area under cultivation in the Colony in 1933 was 1,197 acres. The year was marked by a great increase in the number of budded plants of both orange and grapefruit distributed from the nurseries of the Department of Agriculture. There is every indication of a young but promising citrus industry (particularly grapefruit) being established with standard varieties in the localities referred to above.

The future for the lime industry is very uncertain owing to the synthetic production of citric acid. High prices have prevailed for lime oils, but it is doubtful if the lime industry can be maintained on the export of essential oils alone. Inquiries have been instituted to discover the possibilities of entering the green lime trade with Canada. The following table gives the exports of concentrated lime juice and essential oil of limes for the five-year period 1929-1933:—

Year.	Concentrated Lime Juice.		Essential Oil of Limes.	
	Quantity in gal.	Value in £.	Quantity in gal.	Value in £.
1929	12,717	2,504	801	9,914
1930	11,373	2,268	660	7,990
1931	8,347	1,670	590	8,293
1932	958	192	730	9,318
1933	—	—	1,166	13,545

Other crops which have been tried at various times include rubber and sisal, but no success has been achieved with them. African oil palms might be worthy of a more extended trial, as they possibly offer some prospects of success in the interior of the Colony.

Provision crops.—Food crops for local consumption can be readily grown, including yams, sweet potatoes, cassava, tannias, plantains, and cereals such as maize and several varieties of millet. The area under ground provisions during 1933 was 16,635 acres. Bananas and other fruit and vegetables are also grown for local use. From these crops small settlers can secure a livelihood, but the local market is strictly limited, and there are only limited markets for such products in the West Indian Islands. A fair export in plantains and tannias exists.

2. FORESTRY.

The total area returned as under forest is over 50,000,000 acres, of which only about 9,000,000 can be regarded as immediately accessible. 576,000 acres have been alienated and 244,000 acres of Crown land are under lease or licence. The remainder, over 8,000,000, consists of Crown land available for application.

Timber.—The timbers produced are hard woods, in particular greenheart and mora, of which there were produced in 1933 from Crown lands 620,020 cubic feet and 31,840 cubic feet respectively. The Colony is the only source of greenheart in the world, and this timber has a special value owing to its great durability. This market is now suffering from competition by other timbers such as Jarrah and Turpentine, and by re-inforced concrete. A system of inspection and certification by the Forests Department and Department of Lands and Mines has been established, and in 1933, 150,589 cubic feet of greenheart were inspected and certified. Other hardwoods produced include crabwood, purpleheart and wallaba.

Wood products which have an export market in the West Indian Islands as well as a local market include firewood and charcoal, of which 68,500 and 5,260 tons respectively were produced in 1933, and shingles, the production of these in 1933 being 2½ millions.

Minor Products.—Other forest products include mangrove bark, used for tanning, and balata, a gum resembling gutta percha, of which fairly considerable quantities are exported. Balata is worked up by the aborigines into ornamental models, etc.

Although the tests which have been carried out from time to time, to determine the suitability of certain local woods for conversion into wood-pulp, established that certain of them were suitable, no attempt was made for a long time to examine the question on a commercial basis.

Recent investigations carried out by Mr. R. V. Evan-Wong have, however, disclosed that so far wallaba holds more promise of producing a first-class wood-pulp for paper manufacture than any other hard wood with which experiments have been made. There are also indications that the pulp would lend itself readily to the manufacture of synthetic boards, roofing-felt, etc.

The successful exploitation of wallaba for the production of wood-pulp would be of enormous importance to the Colony. It is plentiful and widely distributed and owing to the rapid depletion of the soft wood resources of the world, attention must inevitably be directed to the hard wood forests for supplies.

The establishment of a wallaba enterprise such as that outlined would render immediately possible the utilization of some of the enormous hydro-electric resources at present running to waste. It would also furnish the opportunity of abolishing the expensive and uneconomic method of "selective cutting" at present employed in the timber industry and enable "clear cutting" to be substituted. It is only by this latter method coupled with judicious advertising that it will be possible thoroughly to exploit greenheart and the many other less known, but nevertheless valuable, woods with which the forests of the Colony abound.

The average quantity of forest products exported during the five years ending 31st December, 1933, and the quantities exported during 1933 are given in the table below:—

		1929-1933.	1933.
Greenheart	c. ft.	228,328	193,342
Mora	"	15,627	27,827
Crabwood and other kinds ...	"	19,654	2,786
Firewood	tons	12,109	13,674
Charcoal	"	3,073	1,090
Shingles	No.	1,413,540	880,750
Balata	lb.	695,744	479,573

3. ANIMAL HUSBANDRY.

The number of horned cattle in the Colony in 1933 was about 160,000 which included 72,000 on the hinterland savannahs. Horses were returned at 5,616, sheep 35,004, goats 22,408, swine 18,769, donkeys 7,582, mules 1,594, and buffaloes 170. The Colony should be self-supporting as regards meat products. It is not in a position to export to the United Kingdom. If stock-owners co-operated however at least 2,000 head of cattle of a good beef type could be exported to the West Indies, and if export was organized and cattle prepared for this market, the number could be substantially increased.

For grazing purposes the Colony is divided into three divisions, viz.:—

(a) the coastland savannahs, i.e., those situated on the low flat alluvial coastlands, which are for the most part swampy, but fertile when drained; comprising an estimated area of approximately 3,000 square miles, of which about 200 square miles are at present being utilized;

(b) the intermediate savannahs, situated in the rear of the coastland savannahs, comprising an estimated area approximately equal to that of the latter, forming somewhat elevated and undulating infertile grassy sand downs which extend southwards to the 5th parallel of north latitude. Though apparently not so well suited to cattle ranching as the savannahs of the hinterland or the lushgrass flat lands of the coast, these undulating downs should be better suited to sheep farming than the more swampy coast lands. Present occupation for cattle ranching is confined to approximately 462 square miles; and

(c) the interior savannahs which are situated entirely within the western portion of the hinterland and separated from the intermediate savannahs by an extensive intervening belt of forest. These savannahs which extend to the southernmost limits of the Colony cover an estimated area of 6,190 square miles, and comprise sandy grass-clad plains elevated about 300 feet above sea level with, here and there, low grass-clad mountains. The area at present leased or licensed is approximately 3,600 square miles.

4. MINERAL.

Gold has been found in most districts of the Colony but it has been extensively worked only in the Mazaruni, Puruni, and Potaro areas. Between 1884 and 1933 the total production of gold was 2,740,273 ounces valued at £10,037,678, produced mainly by native miners using simple hand methods. In the best days of the industry about 6,000 men were employed, and a maximum production of 138,257 ounces in one year was attained, but production declined to about 7,000 ounces per annum in the years 1927-30. From 1931 exports have increased year by year until they reached over 25,000 ounces in 1933. The decline in output was due rather to the attraction of labour from the gold to the diamond fields, than to exhaustion of the resources of the hinterland. Considerable interest has recently been evinced in the gold industry and there is every indication that the production will be still further increased during 1934.

A statement showing the amount of gold exported during the years 1929 to 1933 is appended:—

Year.	Ozs.	£
1929	5,837	20,945
1930	5,057	18,663
1931	16,519	56,107
1932	19,988	79,499
1933	27,095	131,926

Between 1901 and 1933 the total production of diamonds was 1,936,821 carats, valued at £7,590,584. Latterly, production has declined, and the exports in 1933 were 50,904 carats, valued at £114,989. The principal diamond-bearing area covers about 1,200 square miles in the basin of the Mazaruni River. The Mazaruni and Puruni diamond-fields were geologically examined in 1928 by Mr. H. J. C. Conolly, who expressed the opinion that the possibility of a source discovery of economic importance in those areas was very remote, and that the economic interest must be confined to the alluvial deposits. The development of the gold and diamond industries in the Potaro and Mazaruni has been hampered in the past owing to communication and transport being confined to the rivers which are obstructed by numerous falls and rapids. A natural surface road has now been constructed from Bartica, which is the entrepôt to the gold- and diamond-fields, to a point on the Potaro River known as "Garraway Stream" where a steel suspension bridge has been erected which links the Bartica-Potaro Road with the existing road system through the Potaro gold-fields and the Kangaruma Road on the way to Kaiteur. A branch road from the 75 mile-post on the Bartica-Potaro Road to a point above the Tiboku Falls on the Mazaruni River is at present being constructed. When completed these roads will entirely eliminate the dangerous falls and rapids in the Essequibo and Mazaruni Rivers.

A statement showing the number and weight of diamonds produced and exported during the years 1929 to 1933 is appended:—

Year.	Production.		Exports.	
	No. of stones.	Carats.	Carats.	Value in £.
1929	937,489	125,799	128,115	474,493
1930	856,884	107,201	102,051	298,201
1931	439,234	61,840	65,550	111,584
1932	442,917	60,185	57,069	112,779
1933	364,009	48,568	50,904	114,989

Valuable and extensive deposits of bauxite, the ore of aluminium, have been discovered in easily accessible localities. The most extensive deposits at present known are situated some 60 miles up the Demerara River. Actual mining operations are at present being carried on by the Demerara Bauxite Company, a subsidiary of the Aluminium Company of Canada. The aggregate output since operations were commenced in 1916 up to 1933 was 1,548,591 tons, the output for that year being 36,804 tons. Operations were restricted considerably during 1932 and 1933 owing to the depressed condition of the world's markets. The whole production, after being washed and kiln-dried, is exported to the United States of America and Canada. The development of the industry has involved the establishment of a new settlement at Mackenzie on the Demerara River, where admirable arrangements are made for the housing and general well-being of the employees of the Company, the normal average number of whom is about 800. In 1933, however, the average number of persons employed by the Company was only 194. Additional bauxite deposits in the same locality are leased to the British and Colonial Bauxite Company of London, a company under British control, but mining operations have not yet commenced. There are also deposits, at present unexploited, in the Berbice River and the north-west district of Essequibo.

Geological surveys under Government control were recommended in 1933, a loan having been granted for this purpose from the Colonial Development Fund. The area under examination is that through which the Bartica-Potaro road and its branch to the Mazaruni River at Tiboku Falls run—also the territory made more readily available thereby. So far the surveys have not resulted in any very important finds, although patches of good gold bearing alluvials have been located which appears to warrant further testing by private enterprise. The survey is now being extended into the Potaro-Essequibo-Siparuni area.

The existence of other minerals is known but they are not at present commercially exploited. These include magnetite, palladium mercuride, pitch, plumbago, and manganese.

5. FISHERIES AND MARINE PRODUCTS.

Three schooners and 161 small boats are engaged in fishing, and the local demand for fish is amply met. There is, however, little prospect of development at present. In addition to the sea fishing, there is also a certain amount of river fishing in the interior.

6. MISCELLANEOUS.

Water Power.—A preliminary examination made with a view to determining the extent of and economic possibilities in the water-power resources of the Colony, especially those susceptible of hydro-electric development, disclosed that there could probably be delivered to consumers within say a 200 mile radius net amounts of 273,000 h.p. from the Essequibo, 156,000 h.p. from the Cuyuni, and 21,000 h.p. from the Demerara Rivers.

While this form of development has always been recognized as one of the greatest potentialities which the Colony possessed, the difficulty has been to determine exactly how it could be applied so as to contribute successfully to the economic development of the Colony, principally because the initial construction costs would be of such magnitude as to preclude consideration of any scheme of development which did not ensure immediate demand for a large percentage of the electric power available.

Recent investigations which have been prosecuted at the instance of Mr. R. V. Evan Wong regarding the possibility of converting wallaba wood into pulp, have proved sufficiently promising to warrant the belief that at least some of these potentialities have been brought within measurable distance of realization as the manufacture of wood-pulp almost inevitably implies hydro-electric power.

Further objects which would be achieved by the development of hydro-electric power and consequently a cheap supply of electricity would be the development of the bauxite industry by the reduction of ore into aluminium on the spot in the Colony, instead of shipping the dehydrated ore as at present.

The production of synthetic fertilizers by nitrogen fixation would also be possible, since their successful manufacture depends to a very large extent on a cheap supply of electricity for the electrolytic process of dissociating hydrogen from water.

B.

FOOD SUPPLIES.

The staple foods of the East Indian and negro populations are rice and ground provisions, and adequate supplies of these are produced in the Colony. There are also local supplies which are, or could be made, adequate, of fruit, vegetables, edible oil, milk, fish, and meat, and dairying could be developed to supply butter, which is at present imported. The largest single item of imported foodstuff is wheaten flour. Apart from this and items of a semi-luxury nature, the Colony may be regarded as substantially self-supporting, the total imports of food annually being only about £1 10s. 0d. per head of population.

VI.—Manufactures and Industries.

The following manufacturing and industrial establishments exist:—

Sugar factories	20
Bauxite factory	1
Rice-mills	246
Saw-mills	32
Iron working foundries, and machine shops	10
Aerated water factories	29
Ice factories, electrical power production, and other undertakings of a public utility nature	4
Miscellaneous, including:—	
2 Biscuit factories.	
4 Confectionery factories.	
1 Match factory.	
1 Cigar factory.	
1 Butter and cream establishment.	
1 Boot and shoe factory.	
1 Edible-oil factory.	

All the above are concerned with the preparation of local products for consumption or export, or with production for local consumption.

VII.—Other Economic Activities.

There is no entrepôt trade of any importance. Tourist traffic is being developed by the British Guiana Tourist Committee, which was appointed by the Governor in June, 1934. The Committee consists of three members representing Government, three representing the Georgetown Chamber of Commerce, and the Mayor of Georgetown, with Mr. W. Minshall, Secretary. From 29th July to 31st December, 1934, the colony was visited by 1,053 tourists. At present few go to Kaieteur Fall as the journey takes eight days, but this attraction is now being widely advertised. The possibility of establishing an air service to Kaieteur is being investigated. Several parties have made the trip on experimental flights.

VIII.—Communications.

(i) INTERNAL COMMUNICATIONS.

Roads.—In the coastal area there are 272 miles of road of fair motoring surface (consisting practically of a single road parallel with the coast and numerous very short branch roads). In the interior there are a number of roads and paths, e.g., in the North West, Potaro, and Essequibo Districts; and a cattle trail 182 miles long from Annai on the Rupununi River to Takama on the Berbice is maintained by Government. A road, 102 miles long, from Bartica on the Essequibo to Potaro, to open up the interior, has been constructed with the aid of a loan from the Colonial Development Fund; this road crosses the Potaro River by means of a suspension bridge of 360 ft. span and was opened for traffic in November, 1933.

Railways.—Two single-track railway lines, owned by the Government, are in operation, one 60½ miles long (4 ft. 8½ in. gauge) from Georgetown to Rosignol on the Berbice (opposite New Amsterdam) and the other 18½ miles (3 ft. 6 in. gauge) from Vreed-en-Hoop, on the Demerara opposite Georgetown, to Parika on the estuary of the Essequibo. In 1933 these carried 1,293,471 passengers and 86,348 tons of goods. A third line, 18½ miles long (metre gauge), between Wismar (opposite McKenzie on the Demerara) and Rockstone on the Essequibo was formerly operated by Messrs. Sprotons, Ltd., but has not been used since 1919.

An electric tramway was formerly operated in Georgetown but discontinued in 1930. Omnibus services now run on all the main roads.

Water.—Considerable use is made of water transport. Canals are commonly used for internal transport purposes by the sugar estates and by labourers visiting their plantations which are often behind the estates. The rivers are used for transport from the interior, particularly of timber but also of bauxite, ocean steamers going up to McKenzie to load. Regular passenger services are run as follows:—

(1) by the Government,

(a) ferry services across the Demerara, Essequibo, and Berbice;

(b) river services from New Amsterdam to Paradise (Berbice River), Parika to Bartica and Parika to Adventure and Aurora (Essequibo River);

(c) sea services from Georgetown to the Pomeroon and Moruka Rivers, and to Morawhanna and Mabaruma (North West District), and New Amsterdam to Ikuwuru (Canje Creek area); and

(2) by Messrs. Sprotons, Ltd., from up the Demerara River from Georgetown to Wismar and Mackenzie.

(ii) EXTERNAL COMMUNICATIONS.

The only regular port for external traffic is Georgetown. The principal services are:—

(a) with the United Kingdom (direct); Harrison Line (passenger and cargo); Booker Line (passenger and cargo, monthly); Royal Netherlands Mail (passenger and cargo, three-weekly); (passengers for the United Kingdom commonly proceed to Trinidad or Barbados and tranship).

(b) with Canada: Canadian National Steamships (passengers fortnightly, cargo fortnightly or more often); Ocean Dominion Line (cargo, fortnightly); Canadian Transport Line (cargo bi-monthly);

(c) with Trinidad and West Indies: Canadian National Steamships; Harrison Line; Royal Netherlands Mail; Trinidad Line (passenger and cargo, fortnightly); and others;

(d) with New York; Trinidad Line; Ocean Dominion Line; Munson Line; Furness Bermuda Line; Aluminum Line; Dawnic and Scantic Line; and occasional sailings by other lines;

(e) other services: Royal Netherlands Mail to Holland, Dutch Guiana; Cie Générale Transatlantique to France and French West Indies.

A weekly air-mail service between Miami, Cuba, West Indies, Georgetown, and Brazil is operated by Pan-American Airways Inc.

Georgetown is situated at the mouth of the Demerara River where there is a bar which ocean-going vessels can cross only at high tide. There are eight principal wharves, all privately owned, situated along the river frontage and varying in length from 210-575 feet. The depths alongside range from 10-15 feet at L.W.O.S., but as the bottom is soft mud the vessels may safely lie alongside aground. Ships work cargo with their own appliances. There is a dry dock, length 212 feet on blocks 203 feet; breadth 46 feet 4 inches; bottom 41 feet 4 inches; depth of sill 9½ feet at H.W.O.S.T.

In addition to Georgetown, New Amsterdam, Morawhanna, and Springlands (on the Courantyne) are ports of entry, but in 1933 only eight small vessels entered at New Amsterdam, only sailing vessels of one ton entered at Morawhanna, and only a number of steam launches and very small sailing vessels entered at Springlands.

The following table shows the vessels entered at Georgetown in 1933:—

Country of registration.	Sailing vessels.		Steamers.	
	No.	Net tons.	No.	Net tons.
British	209	15,045	160	459,805
Dutch	33	2,415	75	98,093
Norwegian	—	—	72	94,745
French	—	—	25	24,597
Other	8	1,436	21	31,018
	250	18,896	353	708,258

The following table shows the nationality, number, description and tonnage of vessels entered at all ports of the Colony during 1933:—

Nationality.	Sailing Vessels.		Steam Vessels.		Total.	
	No.	Net tonnage.	No.	Net tonnage.	No.	Net tonnage.
British	359	15,808	169	461,888	528	477,496
Dutch	52	2,489	341	100,816	393	103,305
Norwegian	—	—	72	94,745	72	94,745
French	—	—	25	24,597	25	24,597
German	—	—	6	10,910	6	10,910
United States of America ...	1	121	6	9,000	7	9,121
Danish	1	211	5	7,136	6	7,347
Swedish	—	—	3	3,798	3	3,798
Venezuelan	164	1,205	1	174	165	1,379
Latvian	1	268	—	—	1	268
Total	578	19,902	628	713,064	1,206	732,966

IX.—Tariff.

Import duties are levied on all imports not specifically exempted, at either specific or *ad valorem* rates. Goods not exempted and for which no particular *ad valorem* or specific rate has been prescribed are subject to *ad valorem* duties of 16½ per cent. preferential and 33½ per cent. general. In addition the following additional duties are levied:—

(i) a surtax of three-tenths of the duty on all specific duties (with a few exceptions):

(ii) a Bill of Entry Tax of 3 per cent. *ad valorem* on all dutiable imports with a few exceptions; and

(iii) a surtax of 5 per cent. on *ad valorem* duties in the case of articles imported by parcel post.

Imperial preference is granted in the case of all dutiable imports by the grant of a lower rate of duty (or free entry) for imports of Empire origin. Generally the preferential rate of duty is one-half the general rate.

X.—Trade Representatives, etc.

There are no official trade representatives abroad, but unofficial trade representation is obtained through the representatives of the British Guiana Tourist Committee who are:—

United Kingdom.—Sir Algernon Aspinall, Secretary, The West India Committee.

Canada.—H. C. Collier, Secretary, Canadian-West Indian League, Sun Life Building, Montreal.

United States of America.—C. E. Green, 341, Madison Avenue, New York.

BRITISH HONDURAS.

I.—Situation, etc.

British Honduras lies on the Atlantic side of the mainland of Central America between latitude 15° 50' and 18° 30' North and longitude 88° and 89° West. Its greatest length is about 174 miles and width about 68 miles, the total area being 8,598 square miles.

The climate compares favourably with that of other tropical countries. Europeans will find it pleasant and healthy though malaria is prevalent during the rainy seasons. The temperature ranges from 51° F. to 92° F.

The Colony is divided into three main regions:—

(1) The Northern Plain—north of the Belize River;

(2) Central and Southern Coastal Plain—south from Belize River to the Sarstoon River; and

(3) Central Mountain area.

The plains areas are low-lying but undulating. The soils are largely sandy, supporting pine forest, or low hardwood forest. Extensive swamps exist along the coastal belt. Along the rivers which traverse the Coastal Plain are alluvial belts which form the only cultivable soils of the region. Over certain areas of the Northern Plain good agricultural soils exist. These are largely under the shifting cultivation of the Northern Maya and Spanish-Indian population.

The restricted valleys of the Central Mountain area contain good agricultural soils, which are capable of supporting permanent cultivation of tropical crops.

The average rainfall in the various regions described above is as follows:—

	<i>Inches.</i>
1. Northern Plain	54
2. (a) Central Coastal Plain	76
(b) Southern Coastal Plain	128
3. Mountain area	150-200

Of the total area of about 5,500,000 acres, about 2,700,000 acres are Crown land, including 1,500,000 acres of forest reserve. Much of the alienated land (which is held partly by grant in fee simple and partly by leases for terms of years) is held for timber production or chicle extraction, so that a large proportion of the Colony is virgin land. Some of the estates are large and the largest landowner, the Belize Estate and Produce Company, holds about 1,190,000 acres.

II.—Population, etc.

The population of the Colony at the end of 1933 was estimated at 53,770. It has been increasing fairly rapidly, the population in 1911 being 40,458, in 1921, 45,317, and in 1931, 51,347. The only town of any size is Belize (population of Belize district, 1933, 20,469).

The Colony when first visited by Europeans about 1502 was inhabited by Maya peoples. A few Spaniards, and later Englishmen, settled on the coast in the 16th and 17th centuries, bringing with them negroes from the other European colonies in the Caribbean area. The present population consists of descendants of all these and other immigrant races, with a good deal of intermixture, and a few Europeans and United States citizens. Particulars of birthplaces according to the 1931 census were as follows:—

British Honduras	44,454
Central America and Mexico	4,679
British West Indies	1,004
United Kingdom	193
Others	2,615
	52,945

Languages of population (as at date of census 1921).

<i>Language spoken.</i>	<i>Males.</i>	<i>Females.</i>	<i>Total.</i>
English	10,550	10,928	21,478
Spanish	4,631	4,778	9,409
Maya	2,628	2,788	5,416
Other languages	1,556	1,052	2,608
Total	19,365	19,546	38,911

This table relates to those persons of 5 years of age and upwards only, and in the case of two or more languages being spoken, the figures have been divided equally over each group affected.

Most of the population are employed in forestry and agriculture. There is no substantial emigration or immigration.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The gold dollar of the United States of America is the standard coin; but the effective circulation consists principally of Government currency notes in denominations of 10, 5 and 2 dollars and 1 dollar, which are legal tender to an unlimited amount. These notes are temporarily inconvertible and are in practice treated as being at par with United States of America paper currency. The position of the currency in relation to contemporary developments in the United States of America is under consideration. There is a subsidiary silver currency of 50 cents, 25 cents, 10 cents, and 5 cents, nickel 5-cent pieces and bronze 1-cent pieces coined specially for the Colony.

2. There is a branch of the Royal Bank of Canada and a Government Savings Bank. The balance at the credit of depositors in the latter at the end of March, 1934, was \$254,900. There were 1,414 depositors as at this date.

B.—PUBLIC FINANCE.

1. The funded Public Debt of the Colony on the 31st March, 1934, was \$2,702,796, against which were held Sinking Funds valued at \$277,864.

The charges on the Debt provided in the Estimates for 1934 are (i) Interest \$67,724 and (ii) Sinking Fund \$20,194. There is also a sum of \$84,000 provided to meet annuity payments on the Hurricane Loan.

2 (A) Revenue.

In 1934 a change was made to the calendar year for estimates purposes. The figures of revenue and expenditure are therefore for the nine months, 1st April to 31st December, 1934.

Analysis of Revenue (on the basis of the Estimates for the nine months ended 31st December, 1934).

Self-balancing Departments.

	Revenue.	Expenditure.	Balance.
	\$	\$	\$
Post Office and Radio-telegraph	22,435	28,091	— 5,656
Telephones and Telegraphs	8,415	19,414	— 9,999
Railway	10,000	24,175	— 14,175
	<u>40,850</u>	<u>71,680</u>	<u>— 30,830</u>

Net Deficit, \$30,830.

General Revenue.

	\$	\$	Percentage.
1. Customs—			
Import Duties	239,400		
Export Duties	16,000		
		255,400	58·3
2. Internal Taxation... ..		65,900	15·0
3. Revenues of Government Property		13,750	3·2
4. Fees of Court, etc.		31,550	7·2
5. Interest and Sinking Fund		43,061	9·8
6. Miscellaneous		28,550	6·5
		<u>438,211*</u>	<u>100</u>
* Equivalent at \$4·86=£1 to £90,165.			
Revenue of self-balancing Departments set off against			
Expenditure		40,850	
		<u>\$479,061</u>	

(B) Analysis of Import Duties.

Statistics are not available.

3.—Analysis of Expenditure (on the basis of the Estimates for the nine months ended 31st December, 1934).

	\$	Percentage.
1. Debt Charges	172,218	23·1
2. Administration	295,534	39·8
3. Economic Development	42,896	5·8
4. Social Services	147,059	19·8
5. Defence	4,036	0·5
6. Non-effective, i.e., Pensions	51,704	6·9
7. Deficit on self-balancing Departments	30,830	4·1
	<u>744,277*</u>	<u>100</u>
* Equivalent at \$4·86=£1 to £153,143.		
Expenditure of self-balancing Departments set off		
against Revenue	40,850	
	<u>\$785,127</u>	

4.—Reserve Funds, etc.

There is no Reserve Fund.

5.—Grants-in-aid.

Loans-in-aid of £20,000 were provided from the Imperial Exchequer in respect of the years 1932-33, and 1933-34. Provision of £57,000 has been made on the Colonial and Middle Eastern Services Vote for 1934-35.

Grants and loans from the Colonial Development Fund have been approved in respect of the following Schemes:—

	£
Boundary survey between British Honduras and Guatemala	6,000 (Grant).
Agricultural Station	2,600 (Grant).
Drainage and Reclamation, Belize	3,360 (Grant).
Forest Research	3,360 (Loan).
Training of Forest Utilisation Officer	7,150 (Grant).
	595 (Grant).

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	\$	\$	\$	\$
1913	381,788	18,233	2,726,204	3,126,225
1930	153,379	1,456,020	2,925,564	4,534,963
1931	145,883	1,417,765	1,347,418	2,911,066
1932 (Equivalent at	62,314	723,050	662,120	1,447,484
\$4.86=£1 to ...	£12,822	£148,776	£136,238	£297,836)
1933 (Equivalent at	86,642	481,201	474,252	1,042,095
\$4.86=£1 to ...	£17,828	£99,012	£97,583	£214,423)

(ii) *Domestic Exports by Classes, 1933.*

To —	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	\$	\$	\$	\$	\$
United Kingdom	7,892	73,512	—	—	81,404
Canada	5,722	120,900	—	—	126,622
Rest of Empire	11,750	408	—	—	12,158
<i>Total Empire</i>	25,364	194,820	—	—	220,184
United States of America... ..	82,534	110,912	—	18	193,464
Other foreign countries	6,402	14,060	—	—	20,462
<i>Total foreign countries</i>	88,936	124,972	—	18	213,926
GRAND TOTAL	114,300	319,792	—	18	434,110
Equivalent to	£23,518	£65,801	—	£4	£89,323

(iii) *Principal Domestic Exports, 1933.*

Class I.	Quantity.	Total Value.	Principal Countries of destination with amounts in \$'000.
		\$	
Bananas	141,662 bunches	48,239	United States of America (all).
Coconuts	3,610,450	32,367	United States of America (32).
Grapefruit	5,094 cases	13,462	United Kingdom (8), Canada (5).
Rum	10,815 gal.	10,824	Cayman Islands (10).
Class II.			
Chicle	726,782 lb.	210,013	Canada (121), United States of America (68).
Wood and Timber—			
Mahogany lumber	531,144 s. feet	54,280	United Kingdom (54).
Mahogany logs	109,245 s. feet.	12,199	United Kingdom (all).
Other kinds	—	7,304	United States of America (3), United Kingdom (2).
		73,783	
Skins—			
Alligator	12,139	18,623	United States of America (all).
Shark	18,254	2,294	United States of America (2).
		20,917	
Copra	365 tons	11,742	Mexico (9).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	\$	\$	\$	\$
1913	700,859	38,913	2,345,596	3,085,368
1930	687,324	1,287,490	2,950,516	4,925,330
1931	745,024	1,351,262	2,339,072	4,435,358
1932 (Equivalent at	424,339	746,689	1,130,810	2,301,838
\$4.86=£1 to ...	£87,312	£153,640	£232,677	£473,629)
1933 (Equivalent at	418,511	375,011	893,590	1,687,112
\$4.86=£1 to ...	£86,113	£77,163	£183,866	£347,142)

(ii) Imports by Classes, 1933.

From :—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	\$	\$	\$	\$	\$
United Kingdom	143,706	6,567	268,238	—	418,511
Canada	268,555	17,973	39,905	—	326,433
Rest of Empire	31,014	—	17,564	—	48,578
<i>Total Empire</i>	<u>443,275</u>	<u>24,540</u>	<u>325,707</u>	<u>—</u>	<u>793,522</u>
United States of America... ..	174,365	72,834	384,798	1,903	633,900
Mexico	1,186	37,313	40,455	24	78,978
Holland	53,927	—	1,534	—	55,461
Germany	4,490	99	17,481	—	22,070
Other foreign countries	36,492	8,632	58,007	50	103,181
<i>Total foreign countries</i>	<u>270,460</u>	<u>118,878</u>	<u>502,275</u>	<u>1,977</u>	<u>893,590</u>
GRAND TOTAL	<u>713,735</u>	<u>143,418</u>	<u>827,982</u>	<u>1,977</u>	<u>1,687,112</u>
Equivalent to	£146,859	£29,510	£170,366	£407	£347,142

(iii) Principal Imports, 1933.

(Excluding articles mainly imported for re-export.)

Article.	Quantity.	Total Value. \$	Principal countries of origin with amounts in \$'000.
<i>Class I.</i>			
Grain, flour, pulse, etc.—			
Flour, wheat	28,277 barrels	106,208	Canada (75), United Kingdom (28).
Rice	20,341 cwt.	35,004	United Kingdom (15), Burma (13).
Pulse (beans and peas) ...	816,452 lb.	23,688	United States of America (17).
Farinaceous preparations	—	6,636	United States of America (5).
		<u>171,536</u>	
Milk, preserved—			
Sweetened, unskimmed ...	20,624 cases	59,081	Holland (26), Canada (24).
Unsweetened	—	13,044	Holland (6).
Other kinds	—	2,228	Canada (1).
		<u>74,353</u>	
Meats—			
Beef and pork	2,521 barrels	36,744	United States of America (22), Canada (9), United Kingdom (5).
Smoked and cured, includ- ing bacon and hams ...	134,473 lb.	16,326	United States of America (12), Canada (3).
Other	—	13,197	United States of America (7), Argentine (3).
		<u>66,267</u>	
Sugar—			
Refined	1,010 tons	39,223	Canada (31), United Kingdom (8).
Unrefined	7 „	480	Guatemala (all).
	<u>1,017 „</u>	<u>39,703</u>	
Butter and substitutes—			
Butter	572 cwt.	15,303	Canada (6), United Kingdom (5).
Butter substitutes ...	1,372 „	15,409	Holland (14).
		<u>30,712</u>	
Lard and substitutes ...	3,890 „	28,668	United States of America (21), United Kingdom (7).
Tobacco—			
Unmanufactured	77,123 lb.	15,297	United States of America (15).
Cigarettes	3,360,000 No.	8,877	United States of America (6).
Cigars	61,584 „	954	
Other kinds	667 lb.	514	
		<u>25,642</u>	

(iii) *Principal Imports, 1933—continued.*

<i>Class III.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i> \$	<i>Principal countries of origin with amounts in \$'000.</i>
	Cotton and silk piece-goods	—	112,153	United States of America (49), United Kingdom (39), Japan (18).
	Oils—			
	Gasolene	271,778 gal.	34,866	United States of America (17), Mexico (17).
	Kerosene	206,935 „	27,582	United States of America (15), Mexico (12).
	Lubricating	28,062 „	10,867	United States of America (5), Mexico (3), United Kingdom (2).
		506,775 „	73,315	
	Machinery and parts (all kinds).	—	60,689	United States of America (42).
	Boots, shoes, etc. (all kinds)	70,465 prs.	59,512	United States of America (23), United Kingdom (15), Straits Settlements (10).
	Apparel (all kinds)	—	48,746	United States of America (29), United Kingdom (16).
	Soap (all kinds)	—	39,260	United States of America (28), United Kingdom (7).
	Hardware	—	38,699	United States of America (18), United Kingdom (14).
	Medicines and drugs	—	37,190	United States of America (21), United Kingdom (9).
	Haberdashery and millinery	—	35,243	United Kingdom (19), United States of America (9).
	Painters' colours and materials	—	29,496	United Kingdom (23), United States of America (5).
	Iron and steel manufactures	—	24,721	United Kingdom (18), Canada (5).

V.—*Natural Resources.*

From the point of view of the export trade the forest resources of British Honduras are much more important than the agricultural resources. Until the recent depression, which has had a much greater effect on the former than the latter, forest products represented some four-fifths of the total exports of the Colony and agricultural products less than one-fifth. During the depression the importance of forest produce exports temporarily declined, but in 1933 the old proportions were restored, forest produce representing about 80 per cent. of total domestic exports, and agricultural products 19 per cent., the remaining 1 per cent. representing marine products. On the other hand internal consumption of forest products is negligible, while there is substantial consumption of agricultural products.

1.—*AGRICULTURE.*

The principal export products in order of importance are coconuts and copra, bananas, citrus fruits, and rum, but a large variety of crops, e.g., plantains, sugar, maize, hill rice, ground provisions, and other vegetables are grown for local consumption.

Coconuts are grown in the coastal area both on plantations and by individual agriculturists. The plantations are operated mainly by permanent foremen. Labour is engaged as required and paid by the task. Production is about equally divided between the two classes. Cultivations are often neglected and improvements in the preparation of copra are possible. Approximately 80 per cent. of the nuts are exported as such or as copra and the remaining 20 per cent. are used for the production of locally consumed oil.

As the following figures show the value of exports has fallen heavily during recent years:—

				<i>Coconuts.</i>				<i>Copra.</i>			
				<i>No.</i>	<i>Value in \$.</i>	<i>Quantity in tons.</i>		<i>Value in \$.</i>			
1929	...	...	...	6,390,080	127,782	587		62,699			
1930	...	...	...	4,760,135	68,569	738		71,865			
1931	...	...	...	3,833,613	41,931	408		21,338			
1932	...	...	...	2,974,220	24,860	444		14,700			
1933	...	...	...	3,610,450	32,367	366		11,742			

Bananas and plantains are produced almost entirely by non-European planters, each working as an individual unit but sometimes working in association at harvesting time. Approximately 80 per cent. of the bananas and a very small percentage of the plantains are exported. Exports during recent years have been as follows:—

				<i>Bananas.</i>		<i>Plantains.</i>	
				<i>Bunches.</i>	<i>Value in \$.</i>	<i>No.</i>	<i>Value in \$.</i>
1929	...	...	...	141,840	49,119	366,245	4,124
1930	...	...	...	89,934	32,087	3,000	22
1931	...	...	...	87,036	31,077	9,000	128
1932	...	...	...	78,867	26,910	19,550	178
1933	...	...	...	141,662	48,239	203,000	1,599

The reduction in exports during 1930 to 1932 was due principally to stricter grading and increased rejection on the part of buyers. The increase in 1933 was due to an increase in the area under bananas and it is expected that exports will increase from now onwards.

Citrus fruit.—The only important citrus fruit is grapefruit. British Honduras grapefruit is of exceptionally high quality, comparing favourably with the best Florida fruit. The industry is organized on plantation lines, most of the plantations being owned by Europeans and situated in the Stann Creek Valley, though the industry is also expanding in the north of the Colony.

Labour is for the most part recruited as required.

Exports during recent years have been as follows:—

				<i>Cases.</i>	<i>Value in \$</i>					<i>Cases.</i>	<i>Value in \$</i>
1929	...	...	...	2,903	10,301	1932	...	...	...	2,663	9,319
1930	...	...	...	4,267	14,963	1933	...	...	...	5,094	13,462
1931	...	...	...	2,106	8,378						

The area under grapefruit in the middle of 1934 was estimated at about 680 acres, an increase of 130 acres during the preceding twelve months. Substantial areas are not yet in bearing and further areas are being planted. Shipments of citrus fruit during the 1933-34 season totalled 15,900 cases, of which 14,800 cases were grapefruit. Of the latter 10,600 cases were shipped to London and 4,200 cases to Canada. It is estimated that during the 1934-35 season shipments will amount to about 21,000 cases, including 18,500 cases of grapefruit. The Government is making efforts to develop the industry by various methods including inspection of the fruit before export and standardization of grades and packing. Central packing has been started in the Stann Creek Valley, all fruit now passing through an up-to-date packing house. The British Honduras Citrus Association's new packing plant came into operation at the beginning of the 1933-34 season.

There is a small production of oranges, limes, and seedling grapefruit grown by non-Europeans owning a few scattered trees on their holdings, but the whole crop is consumed locally.

Rum is produced entirely on the small sugar estates in the north owned by persons of Spanish descent and on one sugar estate in the south owned by a European. Apart from the rum consumed locally exports during recent years have been as follows:—

			\$				\$
1929	...	...	14,894	1932	...	...	13,748
1930	...	...	14,165	1933	...	...	10,815
1931	...	...	14,412				

Minor Crops.

Vegetables and fruits, including tomatoes and avocado pears, are grown almost entirely by individual non-Europeans each farming a small acreage. Production increased perceptibly in 1932, but is still small. There is room for development to meet local requirements, but owing to transport difficulties there is little prospect of any export.

Sugar-cane is organized as a plantation crop on estate lines, the labour usually being contracted. The varieties used are the older types of canes which were grown in the West Indies, but some of the newer types have lately been introduced. The factories are primitive and the yield low; while the industry can, with the protection of the present high import duty, supply local requirements, there is little likelihood of its being able to compete in the world markets.

The Government Experimental Station is conducting varietal trials with maize, cassava, beans, and other crops and there is probably scope for the development of these and other local food crops. Such development is to be looked for more from the efforts of small settlers than from the development of large estates. As regards cassava, however, with assistance from the Colonial Development Fund, a factory will shortly be erected for the manufacture of cassava starch, the roots being purchased mainly from small growers. The factory will aim at an initial output of 2,000 tons a year, but will have a capacity of 5,000 tons. The market will be mainly in Canada.

2.—FORESTRY.

The principal exports of forest products are *mahogany*, *cedar*, and *chicle*. *Pine* is exploited on a small scale for the local market but the resources of the pine forests are at present practically untouched, having been held unproductively for thirty years by American concessionaires. Large areas of pine forest owned by Crown and privately are now open for exploitation. Small amounts of *logwood* (formerly the chief item of export from the Colony) and *rosewood* are exported annually but their potential output is far from being realized. An effort is at present being made to extend the markets for logwood and rosewood, sample shipments of the latter having been made to France for veneering and to the United Kingdom, and to find markets for pine and several other promising timbers at present unexploited. These are at present undergoing test at the Forest Products Research Laboratory at Princes Risborough.

The pine which is a pitch pine of good character, though not available in very large dimensions, has opened up extremely well and should find a very good market for high grade material in the United Kingdom. Capital is now required for its exploitation and it is confidently expected that exports of pine lumber will be made from the Colony in the near future.

Of the other woods under test, Banak has already found a small market in the United States of America for cigar boxes. It is probable that high grade sawn lumber would find a ready market in the United Kingdom for cigar boxes, in competition with the Honduras cedar and African and Philippine mahoganies now in use, and for battery separators, in competition with Port Orford cedar. Small shipments have been made for further commercial test for these purposes.

Santa Maria shows some promise as a furniture and constructional wood, and the tests on the remainder have still to be reported.

Prospects for an increased demand of the so-called secondary hardwoods are difficult to estimate. The United Kingdom market requires only the highest grade lumber at a low price and in the total absence of a local market sufficiently elastic to absorb the unexported lower grades, reliance cannot be placed entirely on exports to the United Kingdom. The export of logs to the United States of America obviates the necessity of finding a local market but past experience in the export of logs which have arrived split and wormy has shown that several of the most promising woods can only be shipped in the form of lumber.

The forests of the Colony are held by a few large landowners and the Crown, the proportion of alienated lands being nearly 50 per cent. Crown forests are usually those which were undesirable on account of the type of forest supported by them, or on account of inaccessibility at the time when the large estates were alienated, principally in the first half of the 19th century.

Crown forests are subject to exploitation for forest produce on lines similar to those in force on private estates. Licences to remove forest produce on fixed royalty rates are issued by the Forest Department which attempts to control over-exploitation by excluding from exploitation heavily cut-over lands, and by fixing a minimum girth for timber licences or a minimum tapping girth for chicle licences.

On the Forest Reserves, which form a small percentage of the Crown Forests, it is the policy to permit the felling of such trees only as are marked by the Department and policy for future fellings of timber in the Reserves will include the calling for tenders to exploit mahogany and cedar in the Reserves. This system has already been successfully applied in the case of chicle-bleeding on two Reserves when strict rules for conservative tapping were successfully enforced.

Timber.—Up to the last three years mahogany and cedar were sold in log form mainly to the United States of America. A large part of the same product was thence sold to the United Kingdom markets. Mahogany and cedar buyers from the United States of America maintain agencies in the Colony and contract with local loggers a year ahead for definite volumes of timber. Loggers maintain the necessary organization and engage labour on six- or twelve-month contracts as required.

Contractors obtain their quota of timber by arrangement with the landowners (private or Crown), paying a stumpage royalty on the number of trees cut or, as is common on private, but not on Crown, lands, a rate per thousand feet, board measure, on the timber extracted.

The one exception to the contracting system outlined above is the Belize Estate and Produce Company, a London firm which has large estates in the Colony and which logs its own lands with its own organization.

The world-wide depression of the past three years practically closed down the whole of the mahogany export trade and at the same time several factors considerably altered the future outlook of the trade. There has been a considerable reduction in the United Kingdom market demand for logs and the firm mentioned above has taken advantage of the change and the introduction of a preferential tariff on sawn wood of Empire origin to erect in Belize a modern bandmill for the conversion of their own production and other wood in the Colony. The mill is now supplying the London and Liverpool markets with lumber in competition with the American sawn and British Honduras wood and the Peruvian and Brazilian mahoganies.

Another factor seriously affecting the Colony has been the complete withdrawal of most of the American agencies which in past years financed the local logger in his operations. This withdrawal has put the smaller operators permanently out of the mahogany business. During 1934 there was a small revival of trade with the United States of America in logs again on the advance system but it is extremely doubtful whether there will be any great export of logs in 1935.

It is extremely probable that the mahogany trade of the Colony in the future will tend more and more to the export of lumber and the restriction of the log market to choice wood for the London market and for veneering only.

Chicle, an essential raw material of chewing-gum, is produced only in Mexico, Guatemala, British Honduras, and, to a smaller extent, in other Central and South American countries. It, like timber, is supplied by local contractors under definite contracts with the local buyers of the United States chewing-gum manufacturers, who have a practical monopoly and therefore largely control the industry within the Colony. The contractors obtain concessions to tap chicle from the owners of the forests on a rate-per-pound basis and employ their labour for the tapping season (July to February). The prices paid to the tappers are now so low that the tappers are turning from chicle-bleeding to agriculture, in which, although prices for produce are also low, they can make themselves largely self-supporting from their food crops.

There has been a very considerable fall in the exports of chicle which was due chiefly to overstocking by the manufacturers. The very large increase in export of chicle of domestic origin in 1933 was made possible by the extremely low prices paid to chicleros and it is probable that this total will not be maintained, and it is not impossible that much of this so-called domestic chicle is of Guatemalan origin. The manufacturers are still overstocked and it is likely that the depression in the trade will be extended by reasons of this large export.

The anticipated export of **cohune nuts** has not yet materialized. An American company with private holdings in the south of the Colony has made considerable progress with silvicultural experiments for the conversion of cohune forest into cohune plantation but the recent depression caused the cessation of operations during the years 1931 to 1934. The first production of nuts is anticipated in 1935.

The following table shows the domestic exports of the principal forest products during recent years:—

<i>Mahogany logs</i>				<i>Cedar logs</i>				<i>Mahogany and Cedar lumber, board measure.</i>			
		<i>feet, board measure.</i>	<i>\$</i>			<i>feet, board measure.</i>	<i>\$</i>			<i>\$</i>	
1929	...	14,148,104	1,259,855			688,764	50,039	285,118		33,804	
1930	...	10,829,331	962,562			382,198	28,258	149,492		16,795	
1931	...	3,240,240	297,972			226,865	15,673	140,676		16,668	
1932	...	643,593	51,432			1,476	118	236,686		30,096	
1933	...	109,245	12,199			5,540	554	546,675		55,638	

<i>Chicle.</i>				<i>Logwood.</i>			
		<i>lb.</i>	<i>\$</i>			<i>tons.</i>	<i>\$</i>
1929	...	598,276	275,383			220	5,986
1930	...	361,237	165,156			225	5,130
1931	...	400,624	175,555			268	5,803
1932	...	279,703	98,214			103	1,545
1933	...	726,782	210,013			136	1,702

3.—ANIMAL HUSBANDRY.

The development of stock-breeding for food is now receiving attention, and, although the pastoral industry is at present of little importance, steps are being taken to improve the few herds of cattle raised, as well as poultry and pigs.

On the other hand the breeding of steers and mules for haulage and transport purposes in the forest areas, which was formerly of some importance, has declined in recent years owing to the introduction of mechanical transport.

The following figures show the extent to which the imports of animals required principally for transport purposes have fallen away:—

				<i>Cattle.</i>		<i>Mules.</i>	
				No.	\$	No.	\$
1925	...	...	...	1,675	70,687	292	22,740
1926	...	...	...	1,530	56,099	184	13,361
—	...	...	...	—	—	—	—
1930	...	...	...	576	24,031	407	28,944
1931	...	...	...	640	21,768	80	7,900
1932	...	...	...	400	11,006	7	245
1933	...	...	...	24	280	1	50

The reduction in imports of cattle has, of course, been accelerated by the development of the local industry, and the Colony may become self-supporting in beef and pork, both important articles of diet locally, in the course of the next few years.

The distance from Belize to areas suitable for dairy farming, and consequent difficulties of transportation, are obstacles to the development of a dairying industry.

4.—MINERALS.

There is no known mineral wealth in the Colony.

5.—FISHERIES AND MARINE PRODUCTS.

Marine products, of which there is a small export (\$4,992 in 1933, a figure much below those of a few years back) include turtles, numerous varieties of fish, and lobsters. There is also a small, but apparently increasing, trade in shark and alligator skins. An unknown quantity of fish is caught for local consumption.

B.

FOOD SUPPLY.

Net imports of foodstuffs for 1933 amounted to \$713,735 or \$13.27 per head of population.

There are possibilities in the way of development of food crops as already indicated, and the Colony might be made substantially self-supporting without a very drastic dislocation of its economic life.

The principal foodstuffs imported are:—

				<i>Net Imports.</i>	<i>Sources.</i>
				\$	
Milk, preserved	...	...	...	74,323	Canada, Holland, Denmark, Norway, United States of America.
Wheat flour	...	...	...	106,208	Canada, United States of America, United Kingdom.
Sugar (mainly refined)	...	...	...	39,703	Canada, United Kingdom.
Rice	...	...	...	35,004	United Kingdom, Burma, India.
Butter and substitutes	...	...	...	30,712	Canada, Holland, United States of America, United Kingdom, Australia.

VI.—Industry.

There are very small industrial establishments for, e.g., the production of electricity, and a few small sugar factories, but there is no substantial industrial development.

VII.—Other Economic Activities.

The Colony has a large re-export trade, partly in timber, chicle, and other forest products exported from Guatemala and Mexico through British Honduras, partly in goods of all kinds imported into those countries by the same route, and partly in whisky and other spirits, imported from Canada and the United Kingdom and consigned mainly to the Bahamas, though possibly diverted to other destinations. The former trade has diminished in the same way as the trade in the Colony's own forest products and the latter may be expected to decline with the disappearance of Prohibition in the United States of America.

Re-export figures for 1933 were as follows:—

				<i>Spirits.</i>	<i>Other Goods.</i>	<i>Total.</i>	<i>Domestic Exports (for comparison).</i>
				\$	\$	\$	\$
1933	...	...	...	331,298	276,687	607,985	434,110

VIII.—Communications.

The chief method of transport within the Colony is by water, internally by the many rivers of the Colony, and coastwise by motor vessels and sailing boats. Artificial waterways connect the Belize and Sibun Rivers (the Burdon Canal) and the Sibun River with the Northern Lagoon. Roads are non-existent except for short stretches from the towns, but many bush-tracks are kept cleared by the Government and are usable by mules and, for short distances in the dry season, by motor car.

A railway, 25 miles long, runs up the fertile Stann Creek valley from Commerce Bight. No tram-car or omnibus services exist in the towns.

Communications with the outside world are maintained by a number of steamship services, of which the following are the principal :—

(a) United Fruit Company, serving New Orleans (fortnightly), Mobile (monthly), and neighbouring Central American ports. A fortnightly service from Kingston, Jamaica, where connexion is made with New York is also maintained.

(b) Canadian National steamships serving Kingston, Jamaica, with connexions to the Bahamas, Bermuda, and Canada, and to the United Kingdom by Elders and Fyffes and the Jamaica Direct Fruit Line services.

(c) The Harrison Line steamers from Liverpool calling about once every four weeks.

(d) The Royal Netherland steamships from Holland calling about once a month.

The following table shows the shipping entered at the ports of the Colony in 1933 :—

Nationality.	Sailing vessels.		Steam and Motor vessels.	
	No.	Tons.	No.	Tons.
British	141	1,725	305	91,056
United States of America.	—	—	22	20,042
Other	134	2,106	225	127,359
	275	3,831	552	238,457

There is a weekly air-mail service, Belize being a stopping place on the Pan-American Airways route from Miami to Panama via Mexico and the Central American republics.

There is no quay at Belize. Owing to the shallowness of the harbour sea-going vessels must lie at some distance from the Customs Wharf and discharge their cargo into barges.

There is a small wharf at Commerce Bight at the terminus of the Stann Creek Railway, at which vessels not exceeding 2,000 tons can load and discharge.

IX.—Tariff.

Import duties are levied on a wide range of goods on the following basis :—

(i) goods scheduled in a list of exemptions, mainly of a special nature, are free of duty ;

(ii) specific or special *ad valorem* rates are provided for a large number of scheduled goods ; and

(iii) all other goods are subject to *ad valorem* duties of 10 per cent. preferential and 20 per cent. general.

In practically all cases lower duties (or free entry) are prescribed for goods of Empire origin, the Imperial Preference granted being generally not less than 10 per cent. *ad valorem*.

Certain duties are at present subject to a surcharge of 25 per cent. of the duty and others to a surcharge of 37½ per cent. A package tax of 5 cents per package is also imposed on all imports.

X.—Trade Representatives, etc.

The Colony maintains no trade representatives abroad.

JAMAICA.

I.—Situation, etc.

Jamaica is an island in the Caribbean Sea situated between 17° 43' and 18° 32' North latitude and 78° 11' and 78° 21' West longitude. It is the largest island in the British West Indies, its extreme length being 144 miles and its width varying from 21½ to 49 miles. The total area is 4,540 square miles, or 2,848,160 acres, approximately half the size of Wales. Some 646 square miles, or 413,440 acres are flat and consist of alluvium, marl, and swamps.

A mountain chain, trending generally in an east and west direction, runs through the centre of the island ; its highest point, Blue Mountain Peak, attains an altitude of 7,388 feet. From the central range subordinate ridges run to the north and south coasts of the island, and these and subsidiary ridges break up the whole surface of the country into a series of ridges and intervening valleys. There are numerous rivers and streams, but most of them have a rapid fall and are not to any considerable extent navigable.

A great diversity of climate is obtainable, the shade temperature varying according to the season from 80°-86° on the east coast to as low as 40° on the tops of the highest mountains. The average rainfall over the whole island is about 73 inches per annum, but it varies greatly in different districts, and at Kingston the average is only 31.5 inches. The atmosphere is generally dry and healthy.

As a result of the diversity of both altitude and climate, and also a diversity of geological formation, there is a great variety of agricultural conditions and many different crops are produced.

The island, like the rest of the Caribbean islands, is subject to the visitation of hurricanes during the hurricane season from June to November, which sometimes do great damage to crops and buildings, and occasionally cause loss of life. It is also subject to earthquakes but shocks of severe intensity are of rare occurrence. Kingston was devastated by such an earthquake in 1907, and part of the town of Port Royal was engulfed in an earthquake in 1692.

A feature of the land distribution is the number of small peasant holdings. There are estimated to be about 189,000 small holdings, the extension of which has been brought about by the sale of Crown lands on the instalment system and by the splitting up of estates into a number of land settlement schemes.

II.—Population.

The estimated population at the end of 1933 was 1,090,269. This had increased from 858,118 in 1921 and 831,383 in 1911, and a fairly rapid rate of natural increase is indicated by the figures of births and deaths for 1933, which were 35,668 and 20,969 respectively, giving an excess of births of 14,699. Formerly there was a considerable emigration from Jamaica to foreign countries in the Western Hemisphere, principally Cuba, the United States of America, and Central American Republics, but owing to immigration restrictions and the general depression in recent years emigration has been considerably curtailed and emigrants have returned to the Colony in large numbers. In 1933 the total of persons leaving the Colony was returned as 636, and the total arriving in the Colony as 2,638.

The distribution of the population among the various racial groups at the Census of 1921 was as follows:—

White	14,476
Coloured	157,223
Black	660,420
East Indian	18,610
Chinese	3,696
Others	3,693
Total	858,118

The only large town is Kingston, the capital and chief port. Its population at the end of 1933 was estimated at 73,575. Other towns of some importance include Spanish Town (8,694), Montego Bay (6,580), and Port Antonio (6,272). These latter population figures are from the 1921 Census, the last occasion on which a census has been taken in the Colony.

III.—Finance.

A. CURRENCY AND BANKING.

The following are legal tender in Jamaica:—Gold, silver, and copper coins of the United Kingdom, local cupro metal coins and local Government notes. British currency notes ceased to be legal tender as from the 1st August, 1933; the United States of America gold eagle and its sub-divisions, the United States of America gold doubloon and its sub-divisions, United States of America silver and notes are not legal tender but are freely accepted throughout the business community and by the Banks. Accounts are kept in sterling.

The commercial banks doing business in the island are Barclays Bank (Dominion, Colonial, and Overseas), the Bank of Nova Scotia, the Royal Bank of Canada, and the Canadian Bank of Commerce.

There is a Government Savings Bank, with 114 branches and total deposits outstanding (31st December, 1933) £744,925.

Forty-seven Co-operative Loan Banks exist, to which loans are made by the Agricultural Loan Societies Board. From 1913 up to 31st December, 1933, £139,672 had been lent to them and £124,168 repaid. The Banks themselves have accumulated share capital of £42,701.

B. PUBLIC FINANCE.

1. Public Debt.

(a) At the 31st March, 1934, the public debt outstanding was £6,098,846.

(b) The provision for interest and sinking fund for 1934-35 is:—

	£
(1) Interest	190,672
(2) Sinking Fund	67,721

(c) The amount of the sinking funds at the 31st March, 1934, was £2,991,458.

2 (A). Analysis of Revenue (on the basis of the Estimates for the year ended the 31st of March, 1935).

Self-balancing Departments.

	Revenue.	Expenditure.
	£	£
Post Office and Telegraphs	106,000	108,722
Harbour	9,300	5,815
Railway	276,310	365,033
Government Savings Bank	12,069	12,069
Currency Commissioners	2,499	1,275
	<u>406,178</u>	<u>492,914</u>

Net deficit £86,736.

<i>General Revenue.</i>						
					£	Percentage.
1. Customs—						
Import duties				970,000		
Export duties				50		
Package tax				75,000		
					1,045,050	60·3
2. Licences, Excise, and Internal Revenue					467,763	27·0
3. Fees of Office, etc.					183,724	10·6
4. Other heads of Revenue					35,592	2·1
					1,732,129	100
Debt charges reimbursed... ..					171,216	
Revenue of self-balancing Departments set-off against						
Expenditure (excluding Railway)					129,868	
Charges to Colonial Development Fund reimbursed ...					7,706	
Surplus in Sinking Fund for 4 per cent. Loan under						
Law 13 of 1885					220,000	
Gross Revenue					£2,260,919	

2 (B). *Analysis of Import Duties, 1933.*

Amount of duty collected on articles exported from:—

<i>Class</i>	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	£	£	£	£
I	125,008	222,461	126,872	474,341
II	119	2,218	11,868	14,205
III	107,120	134,729	190,100	431,949
IV	11	1	6	18
Parcels Post		Details not available.		26,239
Total	232,258	359,409	328,846	946,752

3. *Analysis of Expenditure (on the basis of Estimates for the year ended 31st March, 1935).*

	£	Percentage.
1. Deficit on self-balancing Departments	86,736	4·7
2. Debt charges	93,361	5·1
3. Administration	861,924	47·1
4. Economic development	89,623	4·9
5. Social Services—		
Medical	198,006	
Education	217,785	
Other	179,808	
	595,599	32·5
6. Defence	16,611	0·9
7. Non-effective, i.e. Pensions	87,592	4·8
	1,831,446	100·0
Debt charges reimbursed	171,216	
Expenditure of self-balancing Departments set-off		
against Revenue (excluding Railway)	129,868	
Expenditure refunded by Colonial Development Fund ...	7,706	
Insurance Fund from Surplus in Sinking Fund	120,000	
Gross Expenditure	£2,260,236	

4. *Reserve Funds, etc.*

At the 31st March, 1934, there was a surplus of assets over liabilities of £61,346. This amount is not liquid, however; it represents mainly the value of stores and advances made for various purposes.

There is also an Insurance Fund amounting to £124,689 on the 31st March, 1934. This is not available for the relief of general revenue, but is for use to meet damage caused by hurricane, earthquake, fire, or similar calamity.

5. *Grants-in-aid.*

No grants-in-aid or loans-in-aid of administration have been received from His Majesty's Government.

The Colony has received the following assistance from (a) the Colonial Development Fund, and (b) the Empire Marketing Fund.

(a) (1) A loan of £50,000 to the Jamaica Banana Producers Association for the purchase of two ships for the carrying trade.

(2) A free grant of £2,000 for the establishment of two laboratories for banana research.

(3) A free grant not exceeding £5,000 for the improvement of harbour lights. Total amount received to 31st March, 1933, is £3,854.

(4) A free grant of interest for seven years on a loan for the relaying of the Jamaica railway track, estimated at £1,600 per annum. The total amount received to 31st March, 1933, is £1,056.

(b) (1) Free grants totalling £988 in aid of the development of the silk industry to 31st March, 1934.

(2) Free grants totalling £3,600 in aid of the Jamaica Producers Association.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
			£	£	£	£
1913	...	...	424,491	176,408	1,829,308	2,430,207
1930	...	...	1,114,405	1,092,757	1,857,521	4,080,783*
1931	...	...	1,140,295	901,897	1,345,803	3,408,853*
1932	...	...	1,597,494	891,650	746,292	3,252,127*
1933	...	...	1,603,971	716,162	410,374	2,745,300*

(ii) *Domestic Exports by Classes, 1933.*

<i>To—</i>			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
			£	£	£	£	£
United Kingdom	...	...	1,212,305	35,692	93,806	—	1,341,803
Canada	...	...	659,267	1,491	178	—	660,936
Rest of Empire	...	...	19,975	471	2,112	211	22,769
<i>Total Empire</i>	...	...	1,891,547	37,654	96,096	211	2,025,508
United States of America...	...	...	160,115	50,537	13,828	—	224,480
France	...	...	19,110	39,161	585	—	58,856
Germany	...	...	28,244	2,303	—	—	30,547
Other foreign countries	...	...	20,312	8,043	12,950	1,080	42,385
<i>Total foreign countries</i>	...	...	227,781	100,044	27,363	1,080	356,268
Parcels Post (All countries)	...	...	—	—	—	14,793	14,793
Ships' stores	...	...	532	—	1	—	533
GRAND TOTAL	...	...	2,119,860	137,698	123,460	16,084	2,397,102

(iii) *Principal Domestic Exports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total value.</i>	<i>Principal Countries of destination and value</i>
			£	in £'000.
Fruits—				
Fresh—				
Bananas	...	10,557,369 stems	1,018,476	United Kingdom (806), Canada (179) United States of America (33).
Grape fruit	...	11,866,259	60,645	United Kingdom (51), Canada (9).
Oranges	...	92,501 boxes	42,835	Canada (37).
Limes	...	5,968 packages	4,726	United States of America (4).
Other	...	...	2,731	United Kingdom (1), Bermuda (1).
			1,129,413	
Sugar, unrefined	...	45,270 tons	424,295	United Kingdom (260), Canada (163).
Coffee (raw and prepared)	...	87,731 cwt.	218,377	Canada (210).
Coconuts	...	37,437,559	117,578	United States of America (90), Canada (21).
Spices—				
Pimento	...	9,101,329 lb.	69,811	Germany (22), France (19), United States of America (17).
Ginger	...	1,666,111 „	31,048	United Kingdom (14), United States of America (13).
Other	...	...	4	
			100,863	
Rum	...	385,872 gal.	48,273	United Kingdom (36).
Cocoa, raw	...	1,672 tons	32,435	Canada (31).
Tobacco—				
Unmanufactured	...	76,219 lb.	4,734	United Kingdom (4).
Cigars	...	39,862 „	23,145	Panama (9), United Kingdom (6).
Cigarettes	...	496 „	288	Panama (all).
		116,577 „	28,167	
<i>Class II.</i>				
Wood and Timber, unmanufactured—				
Logwood	...	25,104 tons	68,674	France (35), United States of America (27), United Kingdom (3).
Other	...	...	15,957	United Kingdom (3), France (3), United States of America (3).
			84,631	
Copra	...	2,288 tons	21,959	United Kingdom (19).

* Excludes exports for Ships' Stores but includes unclassified exports by Parcel Post to all countries as follows:—

		<i>Ships' Stores.</i>	<i>Parcel Post.</i>			<i>Ships' Stores.</i>	<i>Parcel Post.</i>
		£	£			£	£
1930	...	10,790	16,100	1932	...	19,230	16,691
1931	...	11,897	20,858	1933	...	26,198	14,793
28675							M 4

(iii) *Principal Domestic Exports, 1933—continued*

Class III.	Article.	Quantity.	Total value. £	Principal Countries of destination and value in £'000.
	Logwood extracts	30,045 cwt.	101,528	United Kingdom (87).
	Essential Oils—			
	Orange	6,690 gal.	9,357	United States of America (8).
	Lime	596 "	5,510	United States of America (3), United Kingdom (2).
	Pimento	1,611 "	1,841	United Kingdom (1).
		8,897 "	16,708	

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
1913	1,088,310	307,647	1,441,490	2,837,447
1930	1,734,178	1,644,161	2,444,698	6,101,513*
1931	1,406,562	1,457,565	1,870,274	4,945,539*
1932	1,890,526	1,284,515	1,397,479	4,754,152*
1933	1,697,475	1,257,503	1,263,777	4,367,843*

(ii) *Imports by Classes, 1933.*

From—	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	354,117	175,553	1,165,008	435	1,695,113
Canada	490,458	12,607	172,210	22	675,297
Trinidad	157	1,109	237,904	—	239,170
Newfoundland	98,170	—	59	—	98,229
India	48,960	88	36,826	—	85,874
British Guiana	69,014	—	1	—	69,015
Rest of Empire	52,911	24,291	11,880	19	89,101
Total Empire	1,113,787	213,648	1,623,888	476	2,951,799
United States of America... ..	161,181	108,010	418,020	414	687,625
Japan	7	3	200,434	—	200,444
Germany	2,738	50	77,493	—	80,281
Holland	25,221	18	15,317	—	40,556
Other foreign countries	83,733	611	170,203	12	254,559
Total foreign countries	272,880	108,692	881,467	426	1,263,465
Parcels Post (All countries)	—	—	—	149,088	149,088
GRAND TOTAL	1,386,667	322,340	2,505,355	149,990	4,364,352

In addition there were imports of bullion and specie to the value of £3,491.

(iii) *Principal Imports in 1933.*

Class I.	Article.	Quantity.	Total value. £	Principal Countries of origin and value in £'000.
	Grain, flour, pulse, etc.—			
	Grain—			
	Rice	315,646 cwt.	141,065	British Guiana (69), India (47), Siam (25).
	Other	35,048 "	14,426	United States of America (8), Canada (5).
	Flour (all kinds)	446,655 bags of 196 lb.	378,491	Canada (274), United Kingdom (102).
	Meal (all kinds)	90,077 "	69,345	Canada (26), United Kingdom (24), United States of America (18).
	Pulse (all kinds).	23,271 cwt.	21,094	United States of America (8), Chile (7).
	Other Farinaceous preparations.	8,612 "	10,325	United States of America (6).
			634,746	
	Fish—			
	Dried, salted	127,661 cwt.	152,306	Newfoundland (97), Canada (54).
	Pickled and smoked	65,266 "	50,248	Canada (48).
	Other	17,838 "	24,292	Canada (16).
		210,765 "	226,846	
	Milk, condensed—			
	Unskimmed	51,818 cwt.	102,718	United Kingdom (33), United States of America (23), Holland (16), Canada (16), Denmark (12).
	Powdered	258 "	1,134	
		52,076 "	103,852	

* Includes unclassified Parcels Post from all countries as follows:—

1930 ...	£278,476	1931 ...	£211,138	1932 ...	£181,632	1933 ...	£149,008
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(iii) *Principal Imports in 1933—continued.*

<i>Class I—contd.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total value. £</i>	<i>Principal Countries of origin and value in £'000.</i>
Meats—				
	Salted, cured, smoked or pickled.	23,480 cwt.	59,026	United States of America (24), United Kingdom (21), Canada (11).
	Canned	3,285 „	9,054	Argentina (6).
	Fresh	781 „	3,448	Canada (1), United Kingdom (1), New Zealand (1).
		27,546	71,528	
Butter and substitutes—				
	Butter	7,073 cwt.	33,012	New Zealand (29), Canada (2), United Kingdom (1).
	Butter substitutes ...	5,280 „	13,722	United Kingdom (13).
		12,353 „	46,734	
Tobacco—				
	Unmanufactured ...	446,449 lb.	30,267	United States of America (25).
	Cigarettes	36,521 „	12,882	United Kingdom (12).
	Other kinds	6,980 „	1,568	United Kingdom (1).
		489,950	44,717	
	Beer, ale, etc.	154,027 gal.	36,990	United Kingdom (33).
Class II.				
	Coal	120,735 tons	182,866	United Kingdom (172).
	Wood and Timber unmanufactured—			
	Pitch Pine, rough and dressed.	15,601,907 feet	102,854	United States of America (80), Bahamas (22).
	Other kinds		17,656	Canada (11), United States of America (5).
			120,510	
Class III.				
Oils—				
	Motor Spirit	5,171,702 gal.	160,193	Trinidad (142), United States of America (18).
	Kerosene	1,446,036 „	87,902	United States of America (50), Trinidad (34).
	Fuel	85,921 tons	73,203	Trinidad (58), Dutch West Indies (14).
	Lubricating	233,955 gal.	26,553	United States of America (14), United Kingdom (7).
			347,851	
Cotton Manufactures—				
	Piece Goods	17,251,506 yd.	251,873	United Kingdom (153), Japan (73), United States of America (23), Switzerland (2).
	Other Kinds		62,769	United Kingdom (50).
			320,642	
Motor cars, trucks and parts				
	Motor cars	690	91,808	United Kingdom (37), Canada (34), United States of America (19).
	Tyres and tubes ...	29,191	35,181	United Kingdom (14), Canada (14).
	Motor trucks	211	33,995	Canada (14), United Kingdom (11).
	Motor car and truck parts		32,869	United States of America (16), United Kingdom (9), Canada (7).
			193,853	
Machinery and accessories				
			137,635	United Kingdom (82), United States of America (34).
	Boots and Shoes	51,533 doz. pr.	123,714	United Kingdom (78), Czecho-Slovakia (15), Japan (13), Cuba (9).
Silk and Artificial Silk Manufactures—				
	Broad stuffs	3,295,398 yd.	84,083	Japan (68), Italy (6), Hong Kong (4).
	Other kinds		38,863	United Kingdom (16), Canada (7), Japan (7).
			122,946	
Hardware (all kinds) ...				
			119,266	United Kingdom (73), United States of America (18), Germany (13).
Iron and Steel Manufactures				
	Galvanized Iron Sheets		27,058	United Kingdom (27).
	Other kinds		67,383	United Kingdom (38).
			94,441	
Apparel				
			79,859	United Kingdom (30), Japan (19), United States of America (18).

(iii) *Principal Imports in 1933*—continued

<i>Class III—contd.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total value.</i> £	<i>Principal Countries of origin and value</i> in £'000.
	Paper Manufactures	...	75,400	United Kingdom (23), Canada (17), United States of America (14).
	Soap	5,046,974 lb.	73,525	United Kingdom (67).
	Electrical Apparatus	...	69,893	United Kingdom (38), United States of America (26).
	Medicines and drugs	...	66,272	United Kingdom (28), United States of America (25).
	Wood and timber, manufactured.	...	53,124	Canada (17), United States of America (16)
	Cement	103,168 barrels of 400 lb.	47,853	United Kingdom (38).
	Bags and sacks	115,473 doz.	38,595	India (36).

V.—Natural Resources.

A.

1. AGRICULTURE.

A diversified agriculture has been developed as a result of the variety of natural conditions. The large number of peasant proprietors has been mentioned in Section I and they, besides growing foodstuffs for their own use and for sale locally, grow many other crops, bananas, citrus fruits, pimento, etc., for sale to exporters. In addition there are many large and small estates growing bananas, sugar, tobacco, and other crops.

Bananas are the most important product of the Island. 73,000 acres, distributed throughout the Colony, are under bananas and exports represented 42·8 per cent. by value of the total exports in 1933. The industry originated as a peasant crop, but the produce now comes from lands owned and developed by large companies at considerable cost, with the assistance, in some districts, of irrigation, from moderate-sized proprietary estates, from smallholdings, and from peasant plots growing banana plants among other crops. Jamaica has had a high reputation for the cultivation of bananas, but, owing to the recent fall in prices, costs have had to be cut and cultivation is now of a less high standard and some deterioration in yield is noticeable. The peak figure for exports was reached in 1930. The marked decline in production in 1933 was due to exceptional weather conditions late in 1932 and during part of 1933. There was a marked recovery in 1934.

Exports to all destinations during recent years have been :—

	<i>Quantity</i> <i>Stems.</i>	<i>Value</i> £
1929	22,047,536	2,509,878
1930	24,596,585	2,309,741
1931	22,335,605	1,983,395
1932	20,360,613	1,869,111
1933	10,557,369	1,018,476

The markets for Jamaica bananas are in the United States of America and Canada and in the United Kingdom and other parts of Europe. The transport of the fruit, so that it shall arrive at the market in the proper stage of ripeness, is a matter requiring organization and technical skill; a special type of cold storage has been developed for the purpose and it is usual for bananas to be carried in vessels designed for and primarily devoted to that object. Until recently, therefore, bananas for export were purchased by one or other of a number of companies established primarily for the purpose of shipping bananas and financed from abroad. Some of these have established their own banana plantations in Jamaica (and elsewhere). The most important is the United Fruit Company of Boston, United States of America, which controls shipping services throughout the Caribbean and has manifold interests in a variety of products in West Indian and Central American countries. Its subsidiary, the Elders and Fyffes Line, was formerly the principal carrier of Jamaica bananas to the United Kingdom. In 1928, however, the Jamaica Producers Association organized a co-operative marketing system for the shipment of bananas through its own line, the Jamaica Direct Fruit Line. In 1933 the Producers Association sold 2,784,082 stems on behalf of its members at a standard price of over 2s. per stem as compared with 6,546,794 stems in 1932. It now has a membership of about 15,300 and an area under contract of 66,000 acres.

The banana industry has been threatened for many years by Panama disease, which first made its appearance in Jamaica in 1912. It is caused by a soil-inhabiting organism and soil, once infected, is lost to banana cultivation in so far as the Gros Michel variety is concerned. No cure for the disease is known and, if left to develop unchecked, it might destroy the whole industry. Great efforts have therefore been made by the Jamaica Department of Agriculture to combat the disease, on two main lines :—

(a) Destruction of infected roots and quarantine of infected land. Some opposition to this policy has been manifested by growers from time to time and in the parish of Portland the Government finally abandoned control measures in 1931, with the result that production there fell 50 per cent. within two years and is still rapidly decreasing.

(b) Production of an immune variety. The Gros Michel variety, the principal one grown in Jamaica, is susceptible. The Cavendish or Canary banana is immune, and is now being grown experimentally with the object of testing the possibility of commercial production on a limited scale. Attempts are being made to produce new immune varieties suitable for the Jamaica export trade. Some promising seedlings are now under trial and work in this direction is being extended.

There has been a steady loss of land fit for bananas, despite these measures, but production has been maintained and increased by the continued opening of new land, by estates under irrigation and by peasants, helped by Government road schemes, pushing into the mountains.

The principal Empire markets are the United Kingdom and Canada, in both of which Jamaica bananas enjoy preferences, but they are not sufficient to take the whole normal crop.

Sugar is the next most important industry in the Colony. Conditions are, in general, highly suitable for cane-growing and sugar was formerly the principal product; but it declined during the latter part of the 19th century. Sugar is grown in most of the lowland areas of the island, almost always on estates, there being very little peasant cultivation. Some 40,000 acres are under sugar and the total production in 1933 was 55,265 tons and the export 45,270 tons. Exports during recent years have been as follows:—

					<i>Production</i>		<i>Exports</i>	
					<i>tons</i>	<i>Quantity</i>	<i>Value</i>	
						<i>tons</i>	<i>£</i>	
1929	...	...	...	...	55,596	37,380	482,952	
1930	...	...	...	...	67,788	50,374	591,806	
1931	...	...	...	...	50,156	44,294	378,503	
1932	...	...	...	...	58,506	38,488	342,909	
1933	...	...	...	...	55,265	45,270	424,295	

The varieties grown were formerly not of the best, planters having for many years clung to the White Transparent cane. Some years ago this was attacked by mosaic disease and attention was devoted to finding immune seedlings. The Barbados cane B.H. 10 (12) is now the standard cane and other varieties giving satisfactory yields are Ba 11569, S.C. 12/4 and E.K. 28. The resistant, but low-yielding, Uba cane was extensively planted in areas where the mosaic disease was prevalent but it is now rapidly being replaced by the Java canes P.O.J. 2725 and P.O.J. 2727. The P.O.J. 2878 cane has given highly satisfactory yields on some estates.

There are some 40 factories and the average size is small. Equipment in all but a few is inadequate or badly balanced and recovery of sugar is poor, though a welcome tendency to improve factories and increase recoveries has been shown recently. There are, however, several well-equipped and efficiently operated factories with capacities of the order of 10,000 tons of sugar per season. In some districts, e.g., Westmorland, the crop could probably be more efficiently ground by central factories instead of the numerous small factories now existing.

It must, however, be borne in mind, especially in considering the recovery of sugar, that in the past the production of rum, for which a high-purity molasses is desirable, has been almost as important as the production of sugar; and some factories concentrated mainly on rum. The demand for rum has now declined, but the transition from rum to sugar has not yet been completed.

The industry has been in serious difficulties owing to the low world price for sugar during the past few years. In 1930 it was assisted by a Government subsidy of £2 per ton. In 1931 this subsidy was continued on a diminished scale, a sum of £60,000 being divided *pro rata* among producers. In connexion with these subsidies a system of allocation of the domestic and export markets, combined with prohibition of imports, except under licence, and regulation of internal prices, has been established. With the help of these aids and the additional preferences granted by the United Kingdom the industry has been kept going. A Rum Pool was established in 1932, and has operated with success. Each distillery agrees to make the quantity of rum allotted to it, and all participate in the profits of the pool in proportion to the quantities of sugar-cane milled. It is estimated that in 1935 the Pool will distribute from its profits not far short of £1 for every ton of sugar produced in the Colony.

Coconuts are the next most important product, 40,000 acres being returned as under this crop in 1933. Exports are chiefly in the form of nuts, but copra also is exported. Exports during recent years have been as follows:—

					<i>Coconuts.</i>		<i>Copra.</i>	
					<i>No.</i>	<i>Value</i>	<i>Quantity</i>	<i>Value</i>
						<i>£</i>	<i>tons.</i>	<i>£</i>
1929	...	...	...	...	39,918,498	191,971	3,522	65,433
1930	...	...	...	...	31,190,105	119,007	4,645	72,084
1931	...	...	...	...	35,715,583	122,970	3,523	38,638
1932	...	...	...	...	39,238,811	131,526	2,883	33,708
1933	...	...	...	...	37,437,559	117,578	2,288	21,959

A Coconut Producers Association has been formed with the help of the Government and has started the manufacture of edible oil for the local market under the protection of a tariff and licensing system. The decline in exports of copra is due mainly to the local expression of oil for use as edible oil and in the manufacture of soap. These avenues of disposal, combined with the effects of the generally favourable conditions in the United States of America for marketing whole nuts which are used for the manufacture of desiccated coconut, are likely to reduce still further the exports of copra. It is estimated that the local expression of coconut oil in 1933 accounted for a consumption of 3,600 tons of copra, equivalent approximately to 20,000,000 nuts. The possibility of developing a coir industry is worth investigation.

Coffee.—About 6,300 acres are under this crop. The world-famous Blue Mountain coffee, which commands a very high price, is grown in a limited area only and that grown elsewhere is of lower quality and commands only the ordinary world price. Cultivation methods are not good and better yields could be obtained by planting less closely and allowing less shade. Instructors of the Agricultural Society are paying special attention to this crop, and marked improvement in the quality has been brought about in certain districts. The system of produce inspection, applied to this and other products, is assisting to improve the general quality.

Exports during recent years have been as follows:—

			Quantity	Value				Quantity	Value
			cwt.	£				cwt.	£
1929	...	...	58,678	264,566	1932	...	...	79,263	224,057
1930	...	...	61,387	161,621	1933	...	...	87,716	218,313
1931	...	...	81,941	170,993					

Cocoa.—Comparatively little attention is paid to cocoa; cultivation methods are poor and yields low; but if Trinidad supplies should fall off owing to witch-broom disease, the demand for West Indian qualities might be met from Jamaica, where, apart from existing plantations, abandoned banana lands in certain areas might prove suitable for cocoa.

Exports during recent years have been as follows:—

			Quantity	Value				Quantity	Value
			tons.	£				tons.	£
1929	...	...	3,001	116,021	1932	...	...	2,186	48,102
1930	...	...	3,021	81,323	1933	...	...	1,671	32,435
1931	...	...	2,645	50,987					

Spices.—Pimento and ginger are important crops, but values have fluctuated widely and have recently fallen, as the figures below indicate. Jamaica ginger is unrivalled in quality and flavour, but in both commodities the demand is inelastic. In pimento especially the world demand is less than a good year's crop in Jamaica and some regulation of the supply might be profitable. Exports of pimento are mainly to France, Germany and the United States of America. Ginger, which is a kind of root crop, is grown as a separate cultivation but pimento, which is the fruit of a tree found only in Jamaica, is grown in pasture-lands devoted to cattle raising.

Exports during recent years have been as follows:—

			Pimento.		Ginger.	
			Quantity	Value	Quantity	Value
			cwt.	£	cwt.	£
1929	...	...	80,707	348,166	19,005	59,744
1930	...	...	85,025	192,502	22,198	49,304
1931	...	...	109,059	108,668	17,833	27,523
1932	...	...	73,909	61,687	14,834	35,678
1933	...	...	81,261	69,811	14,874	31,046

Citrus Fruits.—This industry has revived in recent years. Exports of grapefruit have increased from 7,000,000 in 1927 to 11,866,259 in 1933, and exports of oranges from 86,238 boxes to 92,501 boxes in the same years. Total citrus exports in 1933 were valued at £109,882. Production is both on estates and on small-holdings, the area devoted to these crops being some 1,860 acres. A Citrus Producers Association has been formed and a central packing house set up. There is need for improvement in cultivation methods, in the planting material used (budded stock should be substituted for seedlings) and in the attention devoted to marketing and grading. With the grant of preferences in the United Kingdom and Canada, there is opportunity for development to supply those markets, and the principal attention of owners of abandoned banana lands is directed to citrus. The establishment of a pre-cooling plant has recently been decided upon and this should assist materially the marketing of citrus fruit. A development programme was embarked upon in 1933, when two large nurseries were established by the Department of Agriculture for the purpose of raising budded plants of standard varieties. Distribution was planned at the rate of 60,000 plants annually, more than 5,000 being issued during the first two months after issues were commenced.

Exports of grapefruit and oranges during recent years have been as follows:—

			Grapefruit.		Oranges.	
			No.	Value	Quantity	Value
				£	boxes.	£
1929	...	...	10,213,560	61,751	10,466	4,587
1930	...	...	9,084,821	54,411	26,959	12,740
1931	...	...	9,931,036	49,058	35,545	17,773
1932	...	...	13,789,370	70,848	92,736	45,171
1933	...	...	11,866,259	60,645	92,501	42,835

Other citrus fruit and products of which there are small exports are fresh limes, tangerines, lemons, canned grapefruit, raw lime-juice, and orange juice.

Tobacco is grown and cured locally, and exported principally in the form of cigars. The principal manufactory in Jamaica uses 150,000 pounds of locally grown tobacco annually. There is a local manufacture of cigarettes but mainly from imported leaf. There is also a native industry of "rope-tobacco" in the parish of St. Elizabeth. About 115 acres were cropped in 1933-34, and the total 1933 crop was estimated at 400,000 lb. Increasing interest is being evinced in tobacco production, and trials with Virginian types are being conducted.

Exports of cigars during recent years have been as follows:—

			Quantity	Value				Quantity	Value
			lb.	£				lb.	£
1929	...	...	65,268	46,598	1932	...	...	47,525	29,421
1930	...	...	69,190	44,779	1933	...	...	39,862	23,145
1931	...	...	64,619	35,347					

Sisal Hemp.—2,000 acres were stated to be under this crop. The production is used for local purposes (with the assistance of tariff protection), but at present there is no export. Production during recent years has been as follows:—

Year.		Fibre. Tons.	Rope. Tons.	Year.		Fibre. Tons.	Rope. Tons.
1929	...	279½	136	1932	...	136	184
1930	...	174½	155	1933	...	235	181
1931	...	176	156				

Foodstuffs for Internal Market.—In 1933 17,774 acres were under "ground provisions", vegetables, and fruits either for consumption by the grower himself and his family or for sale in local markets, which are very well developed in the Colony. The products include rice, maize, many varieties of yams, cocoas, sweet potatoes, and plantains; vegetables, both tropical (e.g., okra, pumpkins, various peas and beans, and avocado pears) and temperate zone (e.g., beetroot, cabbage, lettuce, and potatoes), tomatoes, and numerous fruits and nuts besides those exported, e.g., cashew nuts, mangoes, papaws, melons, and pineapples. No estimate is possible of the value of this production, but it is undoubtedly considerable and suffices to make the Colony potentially more or less self-supporting in food. Some small exports of a few of these products are made, and there has been considerable interest recently in the possibilities of exporting vegetables and small fruits to Canada and the United Kingdom. Organised small scale production and marketing trials are being made.

2. FORESTS.

Considerable woodlands exist but no close estimate of their extent is available. Forest Reserves of 30,000 acres have been proclaimed and an Assistant Conservator of Forests has been attached to the Lands Department, under whose charge a programme of re-afforestation has been initiated.

The principal product exploited is *logwood* exported in the form of logwood dyeing extracts and logs. There is also an export of various other woods (bitterwoods, fustic, lignum vitae, ebony, etc.) valued at about £15,900 in 1933, and there is some local use of miscellaneous timber. Forest exploitation is, however, largely unorganised. The logwood trees grow wild in pasture-land.

Exports of logwood during recent years have been as follows:—

				Logs.		Extract.	
				Quantity tons.	Value £	Quantity cwt.	Value £
1929	...	...	...	21,010	72,907	23,514	86,253
1930	...	...	...	16,240	47,343	18,399	67,804
1931	...	...	...	18,774	48,055	26,259	92,643
1932	...	...	...	19,258	55,230	16,692	57,938
1933	...	...	...	25,104	68,674	30,045	101,528

3. ANIMAL HUSBANDRY.

Cattle.—Pen-keeping is an important industry in Jamaica especially in the central uplands. Guinea grass grows luxuriantly on land cleared from forest and affords excellent grazing for cattle. About 600,000 acres are under grass and mainly used for cattle and over 100,000 cattle are maintained. The general level of the stock is excellent and great attention has been paid to the industry by the Department of Agriculture, which has encouraged the installation of dipping tanks for the control of ticks throughout the Island and has done much breeding work. Considerable success has been achieved by the introduction of Indian blood in crosses with European breeds.

The cattle are produced for beef, for draught, and for dairy purposes. The demand for draught animals both in the Island and in Cuba is poor at present, but both this and the demand for beef may revive if general conditions improve, and there is probably room for development of dairying, there being substantial imports of butter (£33,102 in 1933) and condensed milk (£102,718). The export of beef to neighbouring islands is a possibility. No estimate is possible of the present value of the total products of the cattle industry, which are almost entirely consumed in the Colony.

The cattle are in general free from seripus contagious or infectious disease.

Other livestock.—Considerable numbers of other animals, horses, mules, asses, sheep, goats, and pigs exist, but exact details are not available.

There have been exports of goat skins during recent years as follows:—

Year.		Value. £	Year.		Value. £
1929	...	13,662	1932	...	12,017
1930	...	20,463	1933	...	14,030
1931	...	15,848			

4. MINERALS.

No mineral wealth in commercial quantities, except perhaps copper-ore, is known to exist in Jamaica. The possibilities of copper export are being investigated but it is not yet known whether it can be worked successfully on a commercial basis.

5. FISHERIES AND MARINE PRODUCTS.

Much fish is caught for local consumption. In 1933 the amount was estimated at 1,250 tons, value £87,750, and about 400 boats and 1,200 fishermen were said to be employed. Turtles are also caught and turtle products exported. The value of these exports has steadily decreased during recent years, as the following figures show:—

Year.		Value. £	Year.		Value. £
1929	...	2,607	1932	...	186
1930	...	2,323	1933	...	—
1931	...	1,695			

6. MISCELLANEOUS.

Honey is a product of some importance. A demonstration apiary has been opened by the Agricultural Society with a grant from the Government and proposals for the formation of a Co-operative Producers Association are under consideration.

Exports during recent years have been as follows :—

		Quantity	Value			Quantity	Value
		cwt.	£			cwt.	£
1929	...	16,521	21,342	1932	...	18,296	13,803
1930	...	17,859	15,032	1933	...	13,565	11,643
1931	...	16,775	10,395				

B.

FOOD SUPPLY.

The bulk of the population lives substantially on the produce of the island. It has already been noted that many small-holders grow most of their own food and that there is an extensive marketing of local vegetables and fruits. Other local foods of which the Colony produces a large part of its requirements include sugar, meat (beef and pork), poultry, edible oils, and eggs. The total net imports of food (including drink and tobacco) are about £1 5s. 5d. per head, a lower figure than elsewhere in the British West Indies. The principal items are grain £597,475 (flour £378,450 and rice £141,065); fish £224,602 (salt fish £152,306); condensed milk £102,718; meat £61,469; beer, ale, stout, and porter £36,990; and butter £33,012.

Although butter and meat are imported the local production could be expanded to meet nearly the whole demand. Probably the local production of fish and cereals could also be increased although it is doubtful if the whole demand could be met. Bearing in mind, however, that some part of the imports of food are of a luxury nature and others are for the consumption of visitors, it would probably be possible for the permanent population of the Colony to become practically self-sufficing in food with only small dislocation of its economic life.

VI.—Industry.

There are a number of industrial establishments which may be classified as follows :—

- (i) Sugar factories, 33. See above.
- (ii) Miscellaneous works for "processing" local produce—copra (12), sisal (2), lime-juice (5), edible oil, banana drying, fruit packing, butter, essential oil, etc. The copra works employ approximately 200 persons.
- (iii) The Machado Cigar and Cigarette factory, employing 450 persons. For exports see above.
- (iv) Tanneries and leather works (3).
- (v) The West Indies Chemical Works, manufacturing dyewood extracts.
- (vi) Aerated water factories and breweries (10).
- (vii) Ice factories (6).
- (viii) Miscellaneous, e.g., soap, biscuits, sauces, preserves, tiles, pottery and matches.
- (ix) Small engineering works.
- (x) Electric power stations and gas works.

There are also a large variety of minor workshops.

VII.—Other Economic Activities.

1. Jamaica has a small entrepôt trade with British Honduras, the Central American Republics, and the other West Indian islands. In 1933 re-exports (excluding bullion and specie) were £348,731 and transshipments £253,234.

2. The beauty of the island, its attractive climate and excellent facilities for bathing and other amusements make it a popular tourist resort. A number of up-to-date hotels exist in Kingston, Mandeville, Port Antonio, Montego Bay, and other centres, the largest being the Myrtle Bank Hotel (Kingston) the Constant Spring Hotel (near Kingston) and the Moneague Hotel (St. Ann). During the winter season they are well patronized. Montego Bay is a well known winter resort on account of its famous bathing beach and is the principal resort of the tourists who stay in the Colony for any period of time. In addition large numbers of tourists from "cruise" ships spend a day or so in the island. No exact estimate of the receipts from this source is available, but they must be considerable.

In 1932 there were 5,062 visitors and 27,569 cruise tourists and in 1933 6,339 visitors and 27,383 cruise tourists. The value of the tourist traffic in the former year was roughly estimated at £300,000.

There is a Tourist Trade Development Board, which receives an annual grant of £1,000 from the Government.

3. There is annually a large excess of imports over exports of goods (in the five years 1929-1933 it averaged £1,799,581). It is obvious that there must be large "invisible exports" to balance the account and also to offset the overseas payments made, e.g., by the Government for loan interest, pensions and leave salaries. Tourist receipts no doubt form part of these but it is unlikely that they amount to so large a sum. The earnings of locally-owned vessels trading abroad must also be taken into account. It may be that there are also remittances from Jamaican emigrants abroad and receipts from investments abroad owned by residents; but no information is available on these points.

VIII.—Communications.

(i) INTERNAL COMMUNICATIONS.

There is a good system of macadam roads, which may be divided into:—

(a) main roads, 2,430 miles; and

(b) parochial roads 4,402 miles (2,036 suitable for light motor traffic).

In addition to the roads already constructed under the first three Road Policy Programmes to open up fertile areas and as feeders for the railway, new roads are being built under Laws 17 and 18 of 1933 for the development of areas with a view to the increased production of bananas, etc. The existing roads are being improved as much as possible to meet modern fast-moving motor traffic conditions.

There are 6,358 motor cars and 1,744 trucks and omnibuses on the roads. Fifty-seven omnibuses ply for hire in Kingston and Lower St. Andrew and 77 operate between Kingston and the country districts.

The *Government Railway* (210½ miles in length, 4 feet 8½ inches gauge) has two main lines; Kingston to Montego Bay (north-west coast); and Kingston via Spanish Town to Port Antonio (north-east coast) with several branches. During the year ending 31st March, 1934, it carried 493,980 passengers and 248,058 tons of goods and had a revenue of £224,987 and an expenditure of £265,083 (exclusive of Debt charges).

There is a considerable amount of coasting trade by sea between different parts of the island. Services are maintained by several coastal steamers and by sailing vessels which trade regularly around the island.

There is a tramway system in Kingston and its environs with a total length of 26 miles and carrying 6,400,000 passengers per annum. It is owned by the Jamaica Public Service Co., Ltd.

(ii) EXTERNAL COMMUNICATIONS.

Over 20 companies, British, United States of America, Dutch, and German, maintain one or more regular services to Jamaica and many more regularly send tourist vessels. The most important services are:—

(a) with the United Kingdom, passenger and cargo services weekly by the Jamaica Direct Fruit Line and Elders & Fyffes and at less frequent intervals by the Pacific Steam Navigation Company, the Royal Mail Steam Packet Company and other lines;

(b) with Canada, passenger and cargo services fortnightly by the Canadian National Steamships and Pickford and Black, Ltd.;

(c) with New York and other Atlantic ports, passenger and cargo services weekly or oftener by the United Fruit Company, frequent services by the Standard Fruit and Steamship Company, the Colombian Steamship Company and other lines;

(d) with New Orleans, Cuba, and Central and South American ports, passenger and cargo services at frequent intervals by the United Fruit Company, Elders and Fyffes, Aluminum Line, and other companies;

(e) with the United States Pacific Coast, passenger and cargo services three-weekly by the Gulf Pacific Mail Line, and the East Asiatic Company;

(f) with Continental Europe at various intervals by the Royal Netherlands Mail Line, H. C. Horn Line, Elders and Fyffes, and the East Asiatic Company, and

(g) with New Zealand, passenger and cargo service every two months by the Shaw-Saville Albion Line.

Mails to the United Kingdom and Europe are sent either direct or via the United States of America.

There is also an air-mail service operated by the Pan-American Airways, Inc. Planes arrive in transit at Kingston twice a week, one from Cuba and one from Central America.

While Kingston, a fine natural harbour, is the principal port, Port Morant, Port Antonio, and other ports can all accommodate large ships and have a regular ocean-going traffic. Shipping is entered and cleared at 15 ports of which only the three just mentioned are of substantial importance.

The following table shows the tonnage of vessels entered at all ports of the Colony in 1933:—

Country of registration.	Sailing vessels.		Steamers.	
	No.	net tons.	No.	net tons.
British	71	8,585	541	1,864,488
United States of America...	1	131	291	848,564
Honduras	—	—	74	144,093
Norway	2	1,295	134	158,739
Germany	—	—	64	189,875
Holland	—	—	43	130,020
Other countries	7	4,437	76	348,103
Total	81	14,448	1,223	3,683,882

IX.—Tariff.

Import duties are levied on all imports except a few specially exempted. A number of specific or special *ad valorem* rates are prescribed for particular articles. All articles not exempted or specially enumerated pay duty at *ad valorem* rates of 15 per cent. preferential and 20 per cent. general. In addition a package tax is levied at the rate of 1s. per package, with some exemptions and a few special rates.

Imperial Preference is granted on all dutiable imports by the provision of reduced rates (or free entry) for goods of Empire origin. The margin of preference is generally a quarter of the general duty, that is, in most cases, 5 per cent. *ad valorem*.

X.—Trade Representatives.

The West India Committee act as unofficial trade representatives in the United Kingdom of Jamaica, as of the other West Indian Colonies.

TURKS AND CAICOS ISLANDS.

I.—Situation, etc.

1. The Turks and Caicos Islands, a Dependency of Jamaica, lie between latitude 21° and 22° North and longitude 71° and 72° 50' West at the south-east end of the Bahama Islands. The total area of the Islands is estimated to be about 166 square miles.

The Turks Islands consist of two inhabited islands, Grand Turk and Salt Cay, and four uninhabited islands. The principal islands of the Caicos group are South Caicos, East Caicos, Middle Caicos, North Caicos, Providenciales Island, and West Caicos.

2. The climate of the Islands may be classed as good. The temperature ranges throughout the year from about 60° F. minimum to about 90° F. maximum. The general average rainfall is about 29 inches.

II.—Population, etc.

The estimated population in 1933 was 5,300. It is estimated that of the whole population 5,140 or 97 per cent. are coloured (or of mixed descent), while 160 or 3 per cent. are white and that about 1,800 persons live in the Turks Islands, and 3,500 in the Caicos Islands.

Most of the people of the Turks Islands are employed in the salt industry while the people of the Caicos Islands are engaged in agriculture and fishing.

There is no considerable immigration or emigration.

III.—Finance.

A.—CURRENCY AND BANKING.

The currency of the Dependency consists of United Kingdom coins and Jamaica nickel coins and also currency notes issued by the local Government. A small number of British and foreign currency notes are also in circulation.

The Government Savings Bank is the only bank in the Islands. At the end of 1933 there were 846 accounts open with deposits of £13,364.

B.—PUBLIC FINANCE.

1.—Public Debt.

(a) At the 31st December, 1933, the total public debt was £1,499. This sum has been lent to the Dependency by the Government of Jamaica at 3 per cent.

(b) Interest provided in 1934 Estimates—£45.

(c) Sinking Fund—Nil.

2. (a)—Analysis of Revenue (on the basis of the Estimates for 1934).

Self-balancing Department.

	Revenue.	Expenditure.
Post Office	£598	£310
Net Surplus	£288.	

General Revenue.

	£	Percentage.
1. Customs	4,220	57·0
2. Royalties	1,222	16·5
3. Port dues	800	10·8
4. Surplus of Post Office	288	3·9
5. Internal Revenue and other minor heads	870	11·8
	7,400	100·0
Revenue of Post Office set-off against Expenditure ...	310	
Gross Revenue	£7,710	

(b) Analysis of Import Duties for 1933.

Amount of duty collected on articles imported from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
Class I	760	747	1,454	2,961
Class II	1	34	4	39
Class III	238	73	930	1,241
Class IV	—	8	—	8
Totals	999	862	2,388	4,249

3.—*Analysis of Expenditure (on the basis of the Estimates for 1934).*

		£	Percentage.
1. Deficit on self-balancing Department		Nil.	
2. Debt Charges		45	0·5
3. Administration		5,127	58·1
4. Economic Development		Nil.	
5. Social Services—			
Medical	1,279		
Education	840		
Other	275		
		2,394	27·2
6. Defence		Nil.	
7. Non-effective, i.e., Pensions		1,253	14·2
		8,819	100·0
Expenditure of Post Office set-off against Revenue ...		310	
Gross Expenditure		£9,129	

4.—*Reserve Funds, etc.*

The Dependency has no reserve funds or surplus balances.

5.—*Grants-in-aid, etc.*

No grants-in-aid or loans-in-aid have been received from His Majesty's Government.

The Dependency has received a free grant of £1,000 from the Colonial Development Fund for Public Works (road to lighthouse at Grand Turk).

IV.—*Trade Statistics.*

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	—	7,806	20,001	27,807
1930	412	14,421	11,570	26,403
1931	208	9,752	6,629	16,589
1932	1,313	8,155	4,550	14,018
1933	1,199	11,049	5,103	17,351

(ii) *Domestic Exports by Classes, 1933.*

To	Class I.	Class II.	Class III.	Class IV.	Grand Total.
	£	£	£	£	£
United Kingdom	—	1,199	—	—	1,199
Canada	9,970	5	—	—	9,975
Jamaica	655	—	—	—	655
Bahamas	22	349	3	3	377
Total Empire	10,647	1,553	3	3	12,206
United States of America... ..	2,641	991	—	—	3,632
Haiti	1,419	—	—	—	1,419
Santo Domingo	2	—	—	—	2
Total foreign countries	4,062	991	—	—	5,053
GRAND TOTAL	14,709	2,544	3	3	17,259

(iii) *Principal Domestic Exports, 1933.*

Article.	Quantity.	Total Value.	Principal countries of destination with amounts—£.
<i>Class I.</i>			
<i>Salt—</i>			
Coarse	184,201 bushels	2,840	United States of America (1,567).
Fishery	432,565 bushels	8,943	Canada (7,859), United States of America (1,074).
Other	71,075 bushels	1,706	Canada (1,704).
	687,841 bushels	13,489	
<i>Fish—</i>			
Conches	1,196,600	1,197	Haiti (all).
Other, dried and salted	930 lb.	11	Haiti (all).
		1,208	
<i>Class II.</i>			
Sponge... ..	27,961 lb.	2,031	United Kingdom (1,199), United States of America (634).

IMPORTS.

(i) *Total Imports from:--*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
			£	£	£	£
1913	...	...	3,861	9,088	17,281	30,230
1930	...	...	2,867	2,339	28,959	34,165
1931	...	...	2,568	1,844	19,879	24,291
1932	...	...	5,511	3,982	12,449	21,942
1933	...	...	4,862	3,600	13,438	21,900

(ii) *Imports by Classes, 1933.*

			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Grand Total.</i>
	<i>From</i>		£	£	£	£	£
United Kingdom	...	...	2,568	61	1,669	564	4,862
Canada	...	...	1,067	193	503	3	1,766
British West Indies	...	...	757	185	212	175	1,329
Rest of Empire	...	...	505	—	—	—	505
<i>Total Empire</i>	...	...	4,897	439	2,384	742	8,462
United States of America	...	...	5,704	698	3,835	1,636	11,873
Other foreign countries	...	...	1,043	6	510	6	1,565
<i>Total foreign countries</i>	...	...	6,747	704	4,345	1,642	13,438
GRAND TOTAL	...	...	11,644	1,143	6,729	2,384	21,900

(iii) *Principal Imports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of origin with amounts in £.</i>
	Grain, meal flour, pulse, etc.		4,323	United States of America (1,306), Canada (994), United Kingdom (632).
	Meats, all kinds	47,921 lb.	932	United States of America (850).
<i>Class III.</i>	Cotton goods		1,583	United States of America (1,078), United Kingdom (455).

V.—Natural Resources.

A.

1. *Agriculture.*—There is little agriculture in the Turks Islands, owing to the poverty of the soil, but most of the population of the Caicos Islands are engaged in growing food crops for their own consumption. Cotton and sisal are also grown in small quantities for export.

2. *Other Resources.*—There is no important animal husbandry and no mineral or forest wealth. The principal product of the Dependency is **Salt**. This is produced from sea-water by evaporation and is the principal export (value £13,489 out of total exports of £17,351 in 1933). It is sold in Canada and the United States of America where it has a high reputation for purity. Most of the population of Turks Islands are engaged in the salt industry.

Other marine products produced for export include sponges, conches and turtle-shell.

The following table shows the value of the principal items of domestic produce exported during the last five years:—

<i>Year.</i>	<i>Salt.</i>	<i>Sponges.</i>	<i>Conches.</i>	<i>Turtle Shell.</i>	<i>Cotton and Cotton Seed.</i>	<i>Sisal.</i>
	£	£	£	£	£	£
1929	35,675	2,135	1,350	343	331	39
1930	22,275	2,269	1,188	220	17	37
1931	12,895	2,016	1,122	257	—	47
1932	10,137	2,417	744	341	—	—
1933	13,489	2,031	1,197	150	—	50

Nearly all of the above exports, except salt, were the produce of the Caicos Islands.

B.

FOOD SUPPLY.

The Caicos Islands are substantially self-supporting but the Turks, as already noted, cannot grow their own food. Imports of food amount to rather over £2 per head per annum.

VI.—Industry.

There is no industrial activity.

VII.—Other Economic Activities.

There are no receipts from tourist traffic or entrepôt trade, but the Dependency probably derives some benefit from the earnings of men serving as labourers abroad.

VIII.—Communications.

1. There are no railways or tramways in the Dependency nor are there any omnibuses in use, but there are some fairly good roads in Turks Islands, one of which has lately been improved with

help from the Colonial Development Fund. A few motor cars and motor trucks are in use. The Caicos Islands are served only by bush-paths.

2. There are three ports of entry in the Dependency namely Grand Turk, Cockburn Harbour, and Salt Cay. Each port has an open roadstead and ships anchor at a short distance from the shore.

3. There is regular steamship communication between the Dependency and the United States of America. Steamers of the Royal Netherlands West India Mail, operating between New York and South America, call at Grand Turk on their way south every three weeks and call again on their return north. These vessels carry mails, passengers, and freight.

Steamers of the Fyffes Line, on their way to Jamaica from England, call occasionally at Grand Turk. One of them stops regularly every four weeks to land goods from England.

There is also communication with Jamaica by sailing vessels (one of which is subsidized by the Government) and with San Domingo and Haiti. The island of Grand Turk is an important cable junction and cables run to Jamaica, Barbados, and Bermuda and thence to the outside world. A Government Wireless Telegraph Service maintains communication between Grand Turk, Cockburn Harbour, and Salt Cay and with ships at sea, and there is a public telephone service in Grand Turk.

IX.—Tariff.

All imports, except those on a list of exemptions, are subject to import duties. Specific rates are charged on a number of goods and special *ad valorem* rates on one or two classes; all other goods not exempted are subject to *ad valorem* rates of 10 per cent. preferential and 15 per cent. general.

Imperial Preference is granted by the provision of lower rates on all dutiable goods imported from Empire countries. With the exception of spirits, beer, and wine, the preferential rates are in every case two-thirds of the rates applicable to foreign goods.

X.—Trade Representatives.

The Dependency has no trade representatives abroad.

CAYMAN ISLANDS.

I.—Situation, etc.

The Cayman Islands are a Dependency of Jamaica. They consist of three small islands in the Caribbean Sea lying north-west of Jamaica and approximately midway between that Island and the south-west coast of Cuba, and between longitude 79° 33' and 81° 30' W. and latitude 19° and 20° N. Grand Cayman, the largest of the islands, is twenty miles in length from east to west, four miles in width at the east end, and seven at the west. The other islands are Cayman Brac and Little Cayman, and the total area of the three is about 100 square miles.

The air temperature ranges from 70° F. to 80° F. in the months October to March and ten degrees higher in summer. The rainfall is high, being 63 inches in 1933. The climate is good.

II.—Population, etc.

The population at the end of 1933 was estimated to be 6,290 persons of whom 2,374 were whites or near whites, and 3,916 coloured and black. The proportion of white population is higher than is usual in the West Indies. There is no immigration nor is there any local industry to attract immigrant labour. Formerly there was a steady emigration from the Islands to the United States of America but in recent years this outlet has been closed and emigration restricted to the few who can find employment at sea or in Central America.

Compared to many other West Indian Islands, the density of the population is remarkably low, about 62 to the square mile. This is no doubt due to the lack of suitable agricultural land in the Group.

III.—Finance.

A. CURRENCY AND BANKING.

Sterling currency is legal tender.

There are no local banks or branches of foreign banks in the Dependency. Remittances are made from abroad by drafts on American banks or on branches of banks established in Jamaica which are accepted by any of the shops, and are used by them as remittances for the purchase of stocks of goods. The Post Office money-order system is used to some extent.

B. PUBLIC FINANCE.

1. There is no public debt, except the sum of £3,660 lent by the Government of Jamaica (see paragraph 5 below).

2. (a) *Analysis of Revenue (on the basis of Estimates for the year 1934).*

Self-balancing Department.

		Revenue.	Expenditure.
		£	£
Post Office	...	1,415	742
Surplus	... £673		

General Revenue

	£	Percentage.
1. Customs	3,685	67·5
2. Surplus of Post Office	673	12·3
3. Internal Revenue	518	9·5
4. Port Dues, miscellaneous, etc.	582	10·7
	5,458	100
Revenue of self-balancing Department set-off against Expenditure	742	
Gross Revenue	£6,200	

*2. (b) Analysis of Import Duties for 1933.**Amount of duty collected on articles imported from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
Class I	169	1,181	804	2,154
Class II	33	63	1	97
Class III	391	585	593	1,569
Class IV	52	49	282	383
	645	1,878	1,680	4,203
Parcel Post (all countries)				145
				4,348

3. Analysis of Expenditure (on the basis of the Estimates for the year 1934).

	£	Percentage.
1. Deficit on Self-balancing Department ...	Nil	
2. Debt charges	Nil	
3. Administration	2,791	51·8
4. Economic Development	Nil	
5. Social Services	2,366	44·0
6. Defence	Nil	
7. Non-effective (i.e. Pensions)	231	4·2
	5,388	100
Expenditure of self-balancing Department set-off against Revenue	742	
Gross Expenditure	£6,130	

4. Reserve Funds, etc.

On the 31st December, 1933, there was a surplus of £1,604.

5. Grants-in-aid, etc.

The Dependency received a grant of £1,000 from His Majesty's Government towards the cost of repairing damage in Cayman Brac caused by the hurricane in November, 1932.

No assistance has been received by the Dependency from the Colonial Development Fund or the Empire Marketing Board.

A free grant of £1,000 and a loan of £3,660 have been made to the Dependency by the Government of Jamaica in connexion with repairs necessitated by the hurricane of November, 1932.

IV.—Trade Statistics.**EXPORTS.***(i) Total Exports to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	—	1,548	2,620	4,168
1930	522	6,190	4,431	12,049*
1931	200	4,796	4,260	10,235*
1932	306	2,453	2,361	5,120
1933	194	5,044	3,310	8,548

* Includes Exports for "Ships' Stores" as follows:—

	£
1930	906
1931	979

(ii) Domestic Exports by Classes, 1933.

To	Class I.	Class II.	Class III.	Class IV.	Total.
	£	£	£	£	£
United Kingdom	14	180	—	—	194
Jamaica	293	1,703	1,760	4	3,760
Rest of Empire	—	—	1	—	1
<i>Total Empire</i>	307	1,883	1,761	4	3,955
United States of America...	677	427	—	—	1,104
Other foreign countries ...	—	65	3	—	68
<i>Total foreign countries</i>	677	492	3	—	1,172
GRAND TOTAL	984	2,375	1,764	4	5,127

(iii) Principal Domestic Exports, 1933.

Article.	Total Quantity.	Total Value. £	Principal Countries of destination with amounts in £.
<i>Class I.</i>			
Live Turtles	966	966	United States of America (677), Jamaica (275).
<i>Class II.</i>			
Turtle-shell	1,990 lb.	1,115	Jamaica (935).
Logwood	254 tons	635	Jamaica (all).
Wood Boards	120,000 feet	480	Jamaica (336).
Shark skins	14 cwt.	425	United States of America (all).
Turtle skin	1,300 lb.	130	Jamaica (all).
<i>Class III.</i>			
Rope, Palm Straw	1,403,000 fathoms	1,403	Jamaica (1,400).
Mangrove Bark	180 tons	360	Jamaica (all).

IMPORTS.

(i) Total Imports from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	612	7,670	12,145	20,428
1929	3,002	15,617	21,942	42,710*
1930	4,418	11,858	21,295	41,762*
1931	2,816	8,419	19,687	35,140*
1932	2,918	6,708	10,818	21,460*
1933	5,035	13,274	12,277	31,750*

(ii) Imports by Classes, 1933.

From	Class I.	Class II.	Class III.	Class IV.	Total.
	£	£	£	£	£
United Kingdom	1,330	118	3,170	417	5,035
Jamaica	8,412	226	4,105	331	13,074
Rest of Empire	43	—	96	61	200
<i>Total Empire</i>	9,785	344	7,371	809	18,3
United States of America ...	4,315	482	4,000	2,233	11,030
Other foreign countries ...	1,104	—	124	19	1,247
<i>Total foreign countries</i> ...	5,419	482	4,124	2,252	12,277
Parcel Post from all countries ...	—	—	—	1,164	1,164
GRAND TOTAL	15,204	826	11,495	4,225	31,750

(iii) Principal Imports, 1933.

Article.	Quantity.	Total Value. £	Principal Countries of origin with amounts in £.
<i>Class I.</i>			
Flour	4,692 barrels	3,185	Jamaica (1,717), United States of America (1,183).
Sugar	226 tons	2,057	Jamaica (1,146), Cuba (593).
Corn Meal	1,071 barrels	828	Jamaica (733).
Milk, condensed	1,147 cases	788	Jamaica (402), United States of America (308).

* Includes Parcel Post, not shown in preceding columns, as follows:—

	£
1930	4,191
1931	4,218
1932	1,016
1933	1,164

(iii) *Principal Imports*, 1933—continued.

<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of origin with amounts in £</i>
<i>Class II.</i>		£	
Wood, unmanufactured ... (all kinds)	149,000 feet	618	United States of America (458), Jamaica (160).
<i>Class III.</i>			
Textiles	—	2,945	United States of America (1,355), Jamaica (1,127), United Kingdom (263).
Hardware... ..	—	1,781	United States of America (661), United Kingdom (531), Jamaica (522).
Boots and shoes	416 doz. pair	1,052	Jamaica (764), United States of America (270).
Drugs and Medicines ...	—	975	United States of America (472), Jamaica (400), United Kingdom (103)

V.—Natural Resources.

A.

1. AGRICULTURE.

Agricultural production is comparatively unimportant. The only product of agricultural origin exported is thatch-palm rope (value £1,163 in 1933). There is small cultivation of such articles as vegetables throughout the Islands for local needs.

The accompanying table shows the fluctuations of the thatch rope industry for the five years 1929-1933.

<i>Year.</i>		<i>'000 Fathoms.</i>	<i>Value £.</i>	<i>Average value per 1,000 Fathoms.</i>
1929		1,158	1,450	25/-
1930		1,610	2,014	25/-
1931		1,626	1,626	20/-
1932		1,525	1,534	20/-
1933		1,412	1,163	18/-

2. FORESTRY.

Nil.

3. ANIMAL HUSBANDRY.

The area under pasture is about 5,000 acres. Some 1,500 horned cattle are maintained and a number of other animals. Butter, cheese, and meat are produced but are insufficient to meet local requirements.

4. MINERALS.

Nil.

5. FISHERIES AND MARINE PRODUCTS.

The principal product of the Group is turtles. The green turtles are taken for their meat and the hawks bill turtles for their shells. There is some fishing for local consumption. The number of persons engaged in fishing is returned as 200. The figures of green turtle and hawks bill turtle shell exports for the years 1929-1933 are as follows:—

<i>Year.</i>	<i>Number.</i>	<i>Green turtle Value.</i>	<i>Hawks bill turtle shell Quantity.</i>	<i>Value.</i>
		£	lb.	£
1929	1,834	3,670	4,590	5,962
1930	2,214	4,428	3,000	1,975
1931	2,298	4,552	4,150	2,160
1932	1,004	1,049*	619	306*
1933	966	966	1,990	1,115

B.

FOOD SUPPLY.

There is an importation of food-stuffs amounting to rather over £2 per head of the population.

VI.—Industry.

There is no factory industry, but there is industrial occupation of a part time nature in the production of thatch-palm rope (see above) and in the construction of boats for use in the turtle fisheries and for sale outside the Group. In 1933, three such vessels, with a total tonnage of 89 tons, were built, of which one was exported.

VII.—Other economic activities.

There is no entrepôt trade or tourist traffic but a substantial part of the income of the Islands is derived from the earnings of Cayman vessels and seamen employed outside the Group and the remittances of emigrants to their dependents. These receipts presumably pay for the excess of imports over exports, amounting in 1933 to £23,202.

* Grand Cayman only, other records destroyed.

VIII.—Communications.

There is a system of public main roads. About eighteen miles are suitable for motor traffic.

A service by special motor-vessel between the Dependency and Jamaica makes fifteen voyages per annum with three voyages to a Gulf port in the United States. This service takes mails, passengers, and freight. There are also trading schooners which have auxiliary motors.

IX.—Tariff.

All imports are subject to duty at the rate of 12½ per cent. *ad valorem*, except tobacco and alcoholic liquors, on which various specific rates are charged.

The introduction of a preferential tariff is at present under consideration.

X.—Trade Representatives.

The Dependency has no direct trade representation in other parts of the world.

LEEWARD ISLANDS COLONY.

I.—Situation, etc.

The Colony of the Leeward Islands consists of the islands of Antigua, Barbuda, St. Kitts, Nevis and Montserrat, which form a fairly compact group between longitude 61° and 63° W. and around latitude 17° N.; Dominica, lying about 100 miles to the south, separated by the French island of Guadeloupe from the rest of the Colony; and Anguilla, Sombrero, and the Virgin Islands group lying apart to the north and north-west.

The Colony is divided into five Presidencies, as follows:—

Antigua, including Barbuda; total area 170 square miles;
St. Kitts, including Nevis and Anguilla; area 152 square miles;
Dominica; area 304 square miles.
Montserrat; area 32 square miles.
Virgin Islands; 67 square miles.

The total area of the Colony is 725 square miles.

St. Kitts, Nevis, Montserrat, and Dominica are of volcanic origin. Dominica, in particular, is very rugged, and is divided into a number of deep gorges and valleys by its many rivers. Antigua lies much lower, and has no high hills or important streams. It is, however, much more indented than the other islands, and has a number of harbours.

The climate of the various islands differs. They all have a fairly well marked hot season, but the temperatures attained in Dominica, and to a less degree in Antigua, are considerably higher than those in the more northerly islands, shade temperatures of up to 94° F. being not unusual in Dominica, whereas in the Virgin Islands the temperature is rarely above 88° F. The mean temperature is about 80° F. The rainfall for 1933 was as follows:—Antigua 44 inches, St. Kitts 59 inches, Dominica 82 inches, Montserrat 62 inches and the Virgin Islands 95 inches. Antigua and Nevis are subject to occasional droughts which may result in the loss of much of the season's crops. All the islands are subject to hurricanes, which may do damage to property and crops.

II.—Population.

The estimated population of the various islands was as follows:—

				At 31st December, 1931.		At 31st December, 1933.	
				White.	Coloured.	Total.	Total.
Antigua	...	...	..	909	27,955	28,864	32,424
Barbuda	...	...	...	5	898	903	
St. Kitts	...	...	...	1,035	21,380	22,415	18,540
Nevis	...	...	...	90	11,479	11,569	13,117
Anguilla	...	...	...	94	4,136	4,230	5,231
Dominica	...	...	...	556	36,503	37,059	45,239
Montserrat	...	...	...	112	12,008	12,120	13,062
Virgin Islands	...	...	...	35	5,026	5,061	5,360
				2,836	119,385	122,221	132,973

A small annual increase is shown in most of the Islands. There was formerly some emigration of young men, especially to Cuba, Haiti, San Domingo and Curaçao, and there is considerable disproportion in the numbers of males and females between the ages of 20 and 40 in Antigua and St. Kitts. In the last few years there has been a tendency for these emigrants to return to the Colony in view of the depressed conditions in the larger islands.

III.—Finance.

A.—CURRENCY AND BANKING, ETC.

Sterling is legal tender in the Colony, but notes of Barclays Bank and the Royal Bank of Canada of the denomination of \$5 (equivalent to £1 Os. 10d.) are also in circulation. United States and Canadian currency are current although not legal tender.

The following Banks have branches in the Colony:—

(1) Barclays Bank (Dominion, Colonial and Overseas) at Antigua, St. Kitts and Dominica:

(2) Royal Bank of Canada, at Antigua, St. Kitts, Dominica, and Montserrat.

B. PUBLIC FINANCE.

1. *Public Debt.*

(a) At the 31st December, 1933, the public debt outstanding was:—

	£
Antigua	45,000
St. Kitts-Nevis	40,500
Dominica	6,000
Montserrat	3,000
Virgin Islands	Nil
Total	<u>£94,500</u>

(b) The provision for interest and Sinking Fund for 1934 is:—

	£
(1) Interest—	
Antigua	2,110
St. Kitts-Nevis	2,096
Dominica	300
Montserrat	533
	<u>£5,039</u>
(2) Sinking Fund—	£
Antigua	683
St. Kitts-Nevis	405
Dominica	290
Montserrat	150
Total	<u>£1,528</u>

(c) The value of the Sinking Funds at the 31st December, 1933, was:—

	£
Antigua	25,342
St. Kitts-Nevis	23,584
Dominica	709
Montserrat	1,566
Total	<u>£51,201</u>

2. (a) *Analysis of Revenue (on the basis of the Estimates for the year 1934).**Self-balancing departments.**Federal.*

Nil.

<i>Antigua.</i>	<i>Revenue.</i>	<i>Expenditure.</i>
	£	£
Post Office, etc.	5,765	3,080
Municipal	3,861	4,656
	<u>£9,626</u>	<u>£7,736</u>
Net surplus £1,890.		

St. Kitts-Nevis.

	£	£
Post Office, etc.	4,060	3,848
Electric Light and Cold Storage	2,850	2,938
	<u>£6,910</u>	<u>£6,786</u>
Net surplus £124.		

Dominica.

	£	£
Post Office, etc.	2,267	2,692
Electric Light and Cold Storage	1,880	1,180
Government Fruit Depot	400	770
	<u>£4,547</u>	<u>£4,642</u>
Net deficit £95.		

Montserrat.

	£	£
Post Office, etc.	1,028	1,339
Refrigerating Plant	336	300
	<u>£1,364</u>	<u>£1,639</u>
Net deficit £275.		

<i>Virgin Islands.</i>								£	£
Post Office	...	...	...	...	...	...	...	180	76
Net surplus £104.									

General Revenue.

<i>Federal.</i>								£	Percentage.
1. Contributions from Presidencies	...	...	...	...	...	...	...	44,469	96.5
2. Fees of Court or Office	...	...	...	...	...	...	...	1,490	3.2
3. Miscellaneous	...	...	...	...	...	...	...	100	0.3
								<u>£46,059</u>	<u>100</u>

Antigua.

								<i>Revenue.</i> £	<i>Expenditure.</i> Percentage.
1. Customs	...	...	...	...	...	...	...	47,800	66.5
2. Internal revenue	...	...	...	...	...	...	...	13,804	19.2
3. Fees of Court or Office	...	...	...	...	...	...	...	5,920	8.2
4. Surplus of self-balancing Departments	...	...	...	...	...	...	...	1,890	2.6
5. Other heads	...	...	...	...	...	...	...	2,486	3.5
								<u>71,900</u>	<u>100</u>
Revenue of self-balancing Departments set-off against Expenditure								<u>7,736</u>	
Gross Revenue								<u>£79,636</u>	

St. Kitts-Nevis.

								£	
1. Customs—									
Import duties	...	...	...	...	...	...	...	52,000	
Export duties	...	...	...	...	...	...	...	60	
								<u>52,060</u>	58.8
2. Internal revenue	...	...	...	...	...	...	...	23,275	26.3
3. Port, etc., dues	...	...	...	...	...	...	...	9,200	10.4
4. Surplus of self-balancing Departments	...	...	...	...	...	...	...	124	0.1
5. Other heads	...	...	...	...	...	...	...	3,720	4.4
								<u>88,379</u>	<u>100</u>
Revenue of self-balancing Departments set-off against Expenditure								<u>6,786</u>	
Gross Revenue								<u>£95,165</u>	

Dominica.

								£	
1. Customs—									
Import duties	...	...	...	...	...	...	...	25,200	
Export duties	...	...	...	...	...	...	...	1,700	
								<u>26,900</u>	56.7
2. Internal revenue	...	...	...	...	...	...	...	14,539	30.8
3. Port, etc., dues	...	...	...	...	...	...	...	2,930	6.3
4. Other heads	...	...	...	...	...	...	...	2,860	6.2
								<u>47,229</u>	<u>100</u>
Revenue of self-balancing Departments set-off against Expenditure								<u>4,547</u>	
Gross Revenue								<u>£51,776</u>	

Montserrat.

								£	
1. Customs—									
Import duties	...	...	...	...	...	...	...	9,900	
Export duties	...	...	...	...	...	...	...	600	
								<u>10,500</u>	67.7
2. Internal revenue	...	...	...	...	...	...	...	3,234	20.9
3. Fees of Court and Office	...	...	...	...	...	...	...	917	5.9
4. Other heads	...	...	...	...	...	...	...	850	5.5
								<u>15,501</u>	<u>100</u>
Revenue of self-balancing Departments set-off against Expenditure								<u>1,364</u>	
Gross Revenue								<u>£16,865</u>	

Virgin Islands.

1. Customs—					£		
Import duties ...	...	...	...	...	1,400		
Export duties ...	...	...	...	...	600		
						2,000	46·8
2. Internal Taxation...	...	...	...	...		1,136	26·6
3. Fees of Court and Office ...	...	...	...	...		480	11·3
4. Interest ...	...	...	...	...		400	9·3
5. Surplus of self-balancing Department ...	...	...	...	...		104	2·4
6. Other heads ...	...	...	...	...		150	3·6
						4,270	100
Revenue of self-balancing Department set-off against Expenditure ...	...	...	...	...		76	
Gross Revenue ...	...	...	...	...		£4,346	

2. (b) *Analysis of Import Duties collected during 1933.*

Amount of duty collected on articles imported from:—

		United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
		£	£	£	£
Class I ...	...	21,561	46,000	14,918	82,479
Class II ...	...	443	965	1,139	2,547
Class III ...	...	16,275	11,115	10,828	38,218
Class IV ...	...	2,719	353	1,237	4,309
Total ...	...	£40,998	£58,433	£28,122	£127,553

3. *Analysis of Expenditure (on the basis of the Estimates for the year 1934).*

	Federal.		Antigua.		St. Kitts-Nevis.		Dominica.		Montserrat.		Virgin Is.	
	£	Per-centage.	£	Per-centage.	£	Per-centage.	£	Per-centage.	£	Per-centage.	£	Per-centage.
1. Deficit of self-balancing Departments.	—	—	—	—	—	—	95	0·1	275	1·2	—	—
2. Debt Charges ...	—	—	2,793	3·9	2,501	3·1	590	0·9	683	3·2	—	—
3. Administration	33,229	72·1	17,058	23·8	20,346	25·1	16,067	25·7	5,271	24·6	1,887	28·1
4. Economic Development.	4,096	9·0	5,587	7·8	5,813	7·1	6,581	10·5	2,375	11·8	2,547	38·4
5. Social Services	3,570	7·7	26,399	36·8	31,627	38·0	22,253	35·8	7,114	33·2	523	7·8
6. Defence ...	50	0·1	315	0·4	223	0·3	255	0·4	164	0·8	—	—
7. Non-effective, i.e., Pensions.	5,114	11·1	5,742	8·0	6,471	7·9	5,388	8·6	1,549	7·2	512	7·6
8. Contribution to Federal Revenues.	—	—	13,808	19·3	14,162	18·5	11,200	18·0	3,983	18·0	1,062	18·1
	46,059	100·0		100·0		100·0		100·0		100·0		100·0
Expenditure of self-balancing Departments set - off against Revenue.	—		7,736		6,786		4,547		1,364		76	
Gross Expenditure	—		79,438		87,929		66,976		22,778		6,807	

4. *Reserve Funds, etc.*

Antigua, St. Kitts-Nevis, Dominica, and Montserrat have no reserve funds.

The Virgin Islands, on the 31st December, 1933, had a reserve fund of £10,090.

5. *Grants-in-aid, etc.*

All the Presidencies except the Virgin Islands are at present under the financial control of His Majesty's Treasury and the following grants-in-aid and loans-in-aid from Imperial funds have been received in recent years:—

Antigua.

1930-31.—£5,000 as a grant-in-aid of administration, and £10,500 as a grant-in-aid of relief of distress due to the crisis in the sugar industry.

April-December, 1931.—£8,000 as a grant-in-aid of administration, and £12,000 for the relief of unemployment.

1932.—£21,500 as a loan-in-aid of administration.

St. Kitts-Nevis.

1930-31.—£8,000 as a grant for the relief of unemployment.

April-December, 1931.—£10,000 as a loan-in-aid of administration, and £1,251 as a grant for the relief of unemployment.

Dominica.

1930-31.—£4,500 as a grant-in-aid of administration; a loan of £8,800 for peasant agriculture; and a loan of £8,868 for hurricane relief and other services.

April-December, 1931.—£5,000 as a grant-in-aid of administration; a loan of £4,000 for peasant agriculture; grants and loans totalling £11,000 for hurricane relief and other services.

1932.—£10,500 as a loan-in-aid of administration; grants and loans totalling £2,850 for other services.

1933.—£21,500 as a loan-in-aid of administration; grants and loans totalling £4,028 for other services.

Montserrat.

Has been in receipt of assistance from Imperial funds as from the 1st January, 1933.

Up to 31st December, 1933, £15,000 had been received as a loan-in-aid of administration.

In addition the following assistance has been received from the Colonial Development fund:—

Antigua.

- (1) A free grant of £3,000 for a Leper Asylum.
- (2) A free grant of £10,000 to carry out a health and sanitary campaign.
- (3) A free grant of £8,000 for the construction of concrete drains.
- (4) A free grant of £6,500 and a loan of £6,500 for housing.
- (5) A free grant of £3,000 and a loan of £3,000 for land settlement.
- (6) A free grant of £4,080 for an Engineer to supervise development works.
- (7) A free grant of £3,500 for an Entomologist to investigate the moth-borer pest of sugar-cane.
- (8) A free grant of £7,500 for a water supply.
- (9) A free grant of interest at 5 per cent. for 3 years on £8,500 the capital cost of a gyrotiller (£975).

St. Kitts-Nevis.

- (1) A free grant of £8,500 and a loan of £8,500 for housing.
- (2) A loan of £6,762 for an ice and cold storage plant.
- (3) A free grant of £3,925 and a loan of £3,925 for agricultural settlement.
- (4) A free grant of £1,500 for experimental borings in Basseterre Valley for a water supply.
- (5) A free grant of £896 for an Assistant Agricultural Officer.
- (6) A free grant of £310 for the supply of water to Cayon Village.
- (7) A free grant of £2,700 for the appointment of an Inspector of Public Health.
- (8) A loan of £1,200 for the establishment of a fruit and vegetable trade with Canada.
- (9) A free grant of £3,072 for the appointment of a Survey Engineer and staff.
- (10) A free grant of £665 for the Anguilla water supply.
- (11) A free grant of £300 for a bacteriological laboratory.
- (12) A free grant of £500 for the payment of the Consulting Engineers' fees in connexion with water supply schemes.
- (13) A free grant of £617 to defray the cost of the Consulting Engineer's visit to St. Kitts to advise as to improvement schemes.

Dominica.

- (1) A free grant of £3,200 for the supply of water to villages.
- (2) A free grant of £2,700 for a Medical Officer of Health.
- (3) A free grant of £2,450 for a maternity ward, Roseau Hospital.
- (4) A free grant of £350 for manhole covers.
- (5) Free grants amounting to £31,150 and loans of £31,150 for road construction.
- (6) A free grant of £467 for road and bridge construction.
- (7) A loan of £5,113 for an ice and cold storage plant.
- (8) A free grant of £5,000 for public health schemes.
- (9) A free grant of £750 for an additional ward at Portsmouth Hospital.
- (10) A free grant of £1,500 for swamp drainage.
- (11) A free grant of £120 for the purchase of laboratory furniture and equipment.

Montserrat.

- (1) A loan of £2,500 for a cold storage plant.
- (2) A loan of £2,615 for a botanical experiment station.
- (3) A loan of £5,000 for housing.
- (4) A free grant of £2,020 for the supply of water to Plymouth.
- (5) A free grant of £1,100 for concrete drains.

The Virgin Islands have received no grants-in-aid in recent years.

IV.—Trade Statistics.

EXPORTS.

(1) *Total Exports of the Colony (including Bullion and Specie) to:*(A) *Whole Colony.*

<i>To:—</i>			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
			£	£	£	£
1913	...	...	245,834	213,172	113,622	572,628
1930	...	...	241,768	306,133	110,255	658,156
1931	...	...	89,443	159,239	79,581	328,263
1932	...	...	296,301	144,880	75,146	516,327
1933	...	...	388,725	136,540	58,419	583,684

(B) *Individual Presidencies.*

<i>To:—</i>			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
			£	£	£	£

(a) *Antigua.*

1913	...	...	26,622	99,416	12,181	138,219
1930	...	...	55,810	128,103	1,468	185,381
1931	...	...	7,616	37,564	1,396	46,576
1932	...	...	141,265	51,364	5,100	197,729
1933	...	...	146,852	79,095	1,345	227,292

(b) *Dominica.*

1913	...	...	104,868	10,216	75,577	190,661
1930	...	...	40,514	16,859	55,713	113,086
1931	...	...	22,794	11,479	34,666	68,939
1932	...	...	9,698	15,425	25,518	50,641
1933	...	...	11,618	19,043	14,382	45,043

(c) *Montserrat.*

1913	...	...	26,513	9,519	1,377	37,409
1930	...	...	39,223	6,658	9,846	55,727
1931	...	...	20,475	8,632	5,484	34,591
1932	...	...	8,661	12,406	7,222	28,289
1933	...	...	14,009	4,982	17,292	36,283

(d) *St. Kitts-Nevis.*

1913	...	...	85,377	93,762	24,487	203,626
1930	...	...	105,420	153,725	33,573	292,718
1931	...	...	38,547	101,016	30,170	169,733
1932	...	...	136,677	65,573	29,777	232,027
1933	...	...	216,246	32,395	18,371	267,012

(e) *Virgin Islands.*

1913	...	...	2,454	259	—	2,713
1930	...	...	801	788	9,655	11,244
1931	...	...	11	548	7,865	8,424
1932	...	...	—	112	7,529	7,641
1933	...	...	—	1,025	7,029	8,054

(ii) *Domestic Exports of the Colony by Classes, 1933.*

<i>To—</i>			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total.</i>
			£	£	£	£	£
United Kingdom	...	...	355,841	17,285	13,509	10	386,645
Canada	...	...	108,428	15	550	—	108,993
Rest of Empire	...	...	18,201	1,453	753	2,231	22,638
<i>Total Empire</i>	...	...	482,470	18,753	14,812	2,241	518,276
United States of America...	...	...	2,590	2,014	20,494	21	25,119
Other foreign countries	...	...	1,243	13,089	37	762	15,131
<i>Total foreign countries</i>	...	...	3,833	15,103	20,531	783	40,250
GRAND TOTAL	...	...	486,303	33,856	35,343	3,024	558,526

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of destination with values in £'000.</i>
<i>(a) Antigua.</i>			
<i>Class I.</i>		£	
Sugar, raw	... 22,670 tons	222,922	United Kingdom (145), Canada (74), Trinidad and Tobago (3).
Molasses—(Vacuum Pan)	... 520,232 gal.	1,084	United Kingdom (all).
Lime Juice, raw	... 9,189 gal.	557	
<i>Class III.</i>			
Lime Oil, distilled	... 80 gal.	874	United States of America (all).

(iii) *Principal Domestic Exports, 1933—continued.*

(b) *Dominica.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total value. £</i>	<i>Principal Countries of origin and value in £'000.</i>
<i>Class I.</i>			
<i>Fruit—</i>			
Limes, green	4,325 barrels 3,776 boxes	4,893	United States of America (4).
Oranges	1,596 barrels 5,659 boxes	3,268	Canada (2), Bermuda (1).
Grapefruit	5,981 boxes	2,684	Canada (1), United Kingdom (1).
Other fresh		2,662	
		13,507	
Rum	24,660 gal.	3,811	Leeward Islands (3).
Lime Juice, concentrated	35,467 „	1,817	United Kingdom (all).
<i>Class III.</i>			
<i>Essential Oils—</i>			
Lime, distilled	930 gal.	10,288	United States of America (5), United Kingdom (5).
„ ecuelled	320 lb.	353	
Bay leaf	21,774 „	3,630	United States of America (3).
Orange	1,470 „	294	
In Solution, in Lime Juice	407 „	407	
		14,972	

(c) *Montserrat.*

<i>Class I.</i>			
Lime Juice, raw	48,691 gal.	3,231	United Kingdom (3).
<i>Vegetables—</i>			
Tomatoes	7,335 lb.	1,145	Canada (1).
Other kinds		496	
		1,641	
Limes, green	9,070 barrels	1,317	Canada (1).
<i>Class II.</i>			
Cotton, raw	597,624 lb.	24,595	France (13), United Kingdom (11).

(d) *St. Kitts-Nevis.*

<i>Class I.</i>			
Sugar, raw	22,588 tons	234,747	United Kingdom (210), Canada (22).
Molasses, vacuum pan	630,749 gal.	2,897	Canada (2).
<i>Class II.</i>			
Cotton, raw	88,550 lb.	4,701	United Kingdom (4).

(e) *Virgin Islands.*

<i>Class I.</i>			
Animals, for food (including game and poultry).	—	4,945	American Virgin Islands (4).
Fruit (all kinds)	—	480	
<i>Class II.</i>			
Charcoal	10,404 bags	1,044	American Virgin Islands (1).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) of the Colony from:—*

<i>From:—</i>	<i>United Kingdom. £</i>	<i>Rest of Empire. £</i>	<i>Foreign Countries. £</i>	<i>Total. £</i>
1913	222,506	147,540	218,316	588,362
1930	237,911	306,509	213,478	757,898
1931	210,508	235,223	173,373	619,104
1932	246,592	183,310	121,586	551,488
1933	269,129	202,593	140,282	612,004

(ii) *Total Imports by Classes, 1933.*

<i>From—</i>	<i>Class I. £</i>	<i>Class II. £</i>	<i>Class III. £</i>	<i>Class IV. £</i>	<i>Total Merchandise. £</i>
United Kingdom	60,135	4,696	178,965	25,153	268,949
Canada	82,337	14,523	11,043	1,186	109,089
British West Indies	37,960	3,237	21,770	2,188	65,155
Rest of Empire	4,011	249	23,269	789	28,318
<i>Total Empire</i>	<i>184,443</i>	<i>22,705</i>	<i>235,047</i>	<i>29,316</i>	<i>471,511</i>
United States of America	24,044	16,565	26,804	7,609	75,022
Other foreign countries	16,212	800	46,246	1,744	65,002
<i>Total foreign countries</i>	<i>40,256</i>	<i>17,365</i>	<i>73,050</i>	<i>9,353</i>	<i>140,024</i>
GRAND TOTAL	224,699	40,070	308,097	38,669	611,535

In addition there were imports of bullion and specie to the value of £180 from the United Kingdom; £31 from the "Rest of Empire" countries; and £258 from the Dutch West Indies; total £469.

(iii) *Principal Imports, 1933.*

<i>Article.</i>				<i>Total Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of origin with amounts in £'000.</i>
<i>Class I.</i>						
Grain, flour, meal, pulse, etc.						
Rice	...	...	...	1,575 tons	14,562	British Guiana (13).
Corn meal	...	...	...	17,230 bags of 196 lb.	12,264	United States of America (12).
Other kinds	...	...	...	329 tons	3,946	
					30,772	
Spirits—						
Whisky				9,609 gal.	11,065	United Kingdom (10).
Rum	...	...	...	32,819 "	5,019	Barbados (1), British Guiana (1).
Gin	...	...	...	5,648 "	3,016	United Kingdom (2), Holland (1).
Brandy	...	...	...	407 "	494	
				48,483 "	19,594	
Fish (all kinds)				17,779 cwt.	19,282	Canada (14), United Kingdom (3).
Butter and substitutes				3,931 "	15,188	Canada (6), Barbados (3), United Kingdom (3).
Tobacco—						
Cigarettes	...	...	...	42,789 lb.	12,311	United Kingdom (12).
Other kinds	...	...	...	53,676 "	1,883	United States of America (1).
				96,465 "	14,194	
Sugar—						
Unrefined	...	...	...	691 tons	8,448	British Guiana (3).
Refined	...	...	...	408 "	4,784	United Kingdom (3), Canada (1).
				1,099 "	13,232	
Meats (all kinds)				4,812 cwt.	12,056	United States of America (6), United Kingdom (3), Canada (2).
Lard and substitutes...				2,870 "	6,170	United Kingdom (5).
<i>Class II.</i>						
Wood and timber, unmanu- factured—						
Pitch Pine	...	...	...	1,507,710 feet	15,571	United States of America (15).
White Pine	...	...	...	1,001,445 "	9,769	Canada (9).
Hardwood	...	...	...	206,927 "	3,937	Canada (2), British Guiana (1).
Shingles	...	...	...		2,312	Canada (1), British Guiana (1).
Other	...	...	...		2,944	United States of America (1), Canada (1).
					34,533	
<i>Class III.</i>						
Cotton Manufactures—						
Piece-goods	...	...	...	1,938,623 yd.	40,298	United Kingdom (25), United States of America (6), Japan (5).
Other	...	...	...		29,544	United Kingdom (16), Japan (4), United States of America (2).
					69,842	
Machinery—						
Sugar	...	...	...		16,678	United Kingdom (16).
Other	...	...	...		12,282	United Kingdom (10), United States of America (1).
					28,960	
Oils—						
Motor Spirit	...	...	...	237,403 gal.	8,678	Trinidad (8).
Kerosene	...	...	...	166,118 "	8,210	Trinidad (7).
Lubricating...	...	...	...	32,870 "	3,501	United Kingdom (1), Trinidad (1).
Fuel	...	...	...	92,676 "	1,763	Trinidad (1).
Other	...	...	...	106,236 "	2,988	Trinidad (2).
				635,303	25,140	
Hardware					18,153	United Kingdom (16), United States of America (1).
Bags and Sacks					15,332	India (11), United Kingdom (4).
Chemical Manures				1,421 tons	12,822	United Kingdom (11).
Motor Cars, etc. and parts—						
Motor cars and trucks	...	...	...	72	7,529	United Kingdom (5), Canada (2).
Tyres, etc.	...	...	...		3,180	United Kingdom (1), Canada (1).
Parts and accessories	...	...	...		2,082	United States of America (1).
					12,791	
Boots and Shoes				7,640 doz. pr.	11,915	United Kingdom (7), Hong Kong (3), Malaya (1).

V.—Natural Resources.

A.

1. AGRICULTURE.

(a) *Antigua.*

Sugar is the only important export of Antigua, forming about 98 per cent. of the exports of the Presidency. Nearly 10,000 acres are under sugar-cane. Production in a normal year is between 15,000 and 20,000 tons. In 1931, owing to the very low rainfall the total production of sugar was only 5,000 tons, while in 1933 production was 23,875 tons and exports were 23,373 tons. Canes are grown on a number of estates, and also by small peasant farmers, and are ground at one large and one small central factory. The larger of the two factories has attained a very high standard of efficiency, and, as the result of recent reorganization, dealt in 1933 with a record crop of much larger size than the factory was planned to take.

Owing to the difficult nature of the stiff and heavy soils of the Island, the standard of cultivation has in the past not been so high as in some of the other West Indian Islands, but the necessity for improvement is recognized, and experiments have been made in mechanical tillage, including the gyrotiller recently introduced into the Island by the Antigua Sugar Factory. The results have been so far satisfactory.

There is also room for improvement in planting and manurial practice, and certain experiments in this connexion are now being made under the supervision of a Sugar-cane Investigation Committee. The biological control of the moth-borer *Diatraea Saccharalis* has been under special investigation by Mr. H. E. Box since 1931, with the aid of a grant from the Colonial Development Fund. The introduction of the fly parasite *Lixophaga diatraeae* has recently been made, and this parasite is now successfully established in several of the sugar-cane cultivations. The effect of this introduction is being closely watched, and the results are awaited with interest.

The following table shows the total production and exports of sugar during recent years:—

				Production.		Export.	
				Tons.		Tons.	£
1929	...	...	...	10,755		10,000	119,000
1930	...	...	...	16,750		16,750	173,715
1931	...	...	...	4,990		3,704	35,876
1932	...	...	...	19,251		18,448	175,929
1933	...	...	...	23,875		23,373	194,703

A small quantity of **Sea Island Cotton** is cultivated, but little is now being grown owing to the unsatisfactory state of the market.

There have been some experiments in recent years in the growing of vegetables, particularly tomatoes, as rotation or catch crops, in cane fields and on small-holdings, for export to Canada, but this venture has not proved successful.

There is a considerable production of ground provisions and vegetables for local use, and efforts are being made by the Government to encourage the cultivation of these and other crops by further land settlement schemes for small-holders.

(b) *St. Kitts.*

Sugar is the predominant industry, forming over 80 per cent. of the exports and occupying nearly 10,000 acres. The production in the past has been something less than 20,000 tons per annum but in 1933 production (inclusive of sugar made from canes imported from Nevis) was 24,167 tons and actual exports were 23,000 tons. It is cultivated almost entirely by estates, which sell their canes for grinding to a single central factory. The factory is remarkably efficient, and the cultivation, assisted by easily worked soils, is generally good. There is, however, room for improvement, particularly in manurial practice. Much improvement in yields has been achieved by the introduction of the newer Barbados seedlings and the importance of continuing the trial of new varieties is recognized. The Basseterre Valley presents a problem owing to its comparative dryness. Experiments are being made with drought-resistant varieties (e.g., some of the Java canes) and the possibility of irrigation has also been investigated.

Production and exports of sugar during recent years have been as follows:—

				Production.		Exports.	
				Tons.		Tons.	£
1929	...	...	...	13,724		13,724	162,171
1930	...	...	...	18,680		18,000	185,550
1931	...	...	...	12,021		10,579	114,287
1932	...	...	...	19,969		19,327	191,075
1933	...	...	...	24,167		23,000	227,960

Sea Island Cotton has been and remains the second crop. It can be used as a catch-crop in conjunction with sugar. Owing to the over-supply of this grade of cotton, prices were until recently very low and some planters are trying other alternatives but it will probably continue to be of importance and action to safeguard the seed supply is desirable.

Production and exports of cotton in St. Kitts and Nevis during recent years have been as follows:—

				Production.		Exports.	
				lb.	Equivalent to bales of 400 lb.	lb.	£
1929	...	...	...	756,115	1,891	709,619	66,407
1930	...	...	...	722,763	1,807	778,761	65,484
1931	...	...	...	321,240	803	245,511	12,364
1932	...	...	...	85,000	213	127,444	5,961
1933	...	...	...	49,000	123	88,550	4,701

Vegetables.—Efforts are being made to develop an export of vegetables, particularly tomatoes, and a vegetable depot, packing house, and cold storage plant have been provided, but the venture has not proved a success.

There is some production of ground provisions for local consumption. There are very few peasant holdings, though most of the estates let small plots of land to their labourers for their own cultivation.

(c) *Nevis.*

Sugar was formerly the staple product, but the exports ceased during the depression at the end of the last century. Some production has continued and a small quantity of sugar is made for local consumption. Latterly also, the sugar factory in St. Kitts has made arrangements to buy and transport to that island canes grown in Nevis.

Sea Island Cotton has replaced sugar as the main crop but owing to low prices this also is languishing. In 1931, 1,500 acres were under cotton, but this area was reduced to 250 acres in 1932 and in 1933 to 100 acres. The statistics of production and export given above include Nevis with St. Kitts.

Vegetables.—Attempts are being made to develop exports to Canada but soil conditions are unfavourable for tomatoes. About 210 cwt. of tomatoes were exported to Canada in 1932, and 1,343 crates in 1933, but prices were low.

Generally the condition of agriculture in the island is bad. The soil is stiff and stony and it is difficult to find suitable cash crops, although enough ground provisions and other foodstuffs are normally grown for local subsistence and there is even a small surplus for export to St. Kitts. Endeavours are being made to develop land settlement schemes.

(d) *Dominica.*

Limes have been the staple crop for many years. In 1921, the peak year, the equivalent of 500,000 barrels were exported but the industry has suffered from a succession of disasters, the advent of withertip disease in 1922, a hurricane in 1928 followed by widespread red root disease of seedling limes and further severe hurricanes in 1928 and 1930. In 1933 the total production of limes was estimated to be less than the equivalent of 40,000 barrels. Active steps have, however, been taken to replace the seedlings destroyed by hurricanes and root disease with limes budded on sour orange stock, which are immune to red root disease and stand up to hurricanes well. The distribution of budded limes has been assisted financially by the United Kingdom Government and as their advantages have become known the demand for them is increasing. At the same time endeavours are being made to discover a variety immune from withertip. While much remains to be done there is a strong hope that the cultivation of limes may be successfully re-established.

On the other hand the prospects of selling the products of the industry to advantage are not bright. Hitherto the products of the lime tree have been sold in five forms, viz., green limes, raw lime-juice, concentrated lime-juice, écuelled (i.e., hand-pressed) lime oil, and distilled lime oil. Exports of green limes have been falling steadily and considerable efforts would be required to stimulate this trade.

Lime-juice and lime oil are complementary products, since both are produced by local treatment of the fresh lime, and it used to be thought that the industry depended on there being a satisfactory demand at a profitable price for both commodities alike.

Hitherto there has been a steady demand for lime-juice for the manufacture of citric acid, but this has now almost entirely disappeared owing to the commercial development of the manufacture of citric acid from sugar by a new process, with the result that much of the output of lime-juice is now practically unsaleable.

Lime oil on the other hand is an essential requirement of manufacturers for certain purposes, for which no suitable substitute has yet been found, and it has therefore now become the chief support of the industry instead of being a profitable side-line.

The following table shows the exports of limes and lime products during recent years:—

					<i>Lime-juice.</i>			
					<i>Fresh limes.</i>		<i>Raw.</i>	
					Barrels.	£	gal.	£
1929	...	...	...	...	16,896	23,359	475,102	47,509
1930	...	...	...	...	17,461	26,191	195,994	9,800
1931	...	...	...	...	10,867	13,584	93,255	3,886
1932	...	...	...	...	8,394	10,418	62,545	2,911
1933	...	...	...	...	8,101	4,893	—	—
							<i>Concentrated.</i>	
							gal.	£
							35,446	8,122
							45,832	5,729
							3,211	241
							5,561	193
							35,467	1,817
					<i>Lime oil.</i>			
					<i>Ecuelled.</i>		<i>Distilled.</i>	
					lb.	£	lb.	£
1929	...	...	...	...	5,256	17,081	30,804	41,585
1930	...	...	...	...	1,551	4,216	25,667	34,664
1931	...	...	...	...	2,158	4,611	14,446	21,668
1932	...	...	...	...	617	677	11,218	13,271
1933	...	...	...	...	320	353	9,300	10,288

There has been considerable development in the export of oranges, grapefruit, mangoes, avocado pears, bananas, and other tropical fruits. A Government marketing depot, packing station and cold storage plant has been set up and every endeavour is being made to develop markets particularly in Canada and Bermuda. It is hoped that the fruit trade will develop into an important industry.

Exports were:—

	1931.		1932.		1933.	
	<i>Boxes.</i>	<i>£</i>	<i>Boxes.</i>	<i>£</i>	<i>Boxes.</i>	<i>£</i>
Grapefruit ...	1,531	767	3,954	1,937	59,81	2,684
Oranges ...	3,214	1,971	6,583	2,236	7,255	3,268
Mangoes ...	4,006	995	6,743	1,496	6,872	931
Avocado Pears ...	670	179	1,254	276	2,946	567
	<i>Bunches.</i>		<i>Bunches.</i>		<i>Bunches.</i>	
Bananas	1,556	154	9,017	442	22,302	889

There is some export of **essential oils**, principally bay leaf oil, of which exports during recent years have been as follows:—

	<i>lb.</i>	<i>£</i>
1929 ...	18,349	4,358
1930 ...	15,948	3,987
1931 ...	17,783	4,447
1932 ...	20,915	3,683
1933 ...	21,774	3,630

Cocoa is grown and exports in 1933 were 3,197 cwt., valued at £2,550, but the land suitable for its cultivation is limited.

Coconuts do well in certain areas but the area of suitable soil is limited. Only a small quantity of copra (939 cwt. valued at £882 in 1933) is now exported.

Coffee is being grown and could be developed, but is not being exported in large quantities. Only 10 cwt. were exported in 1933.

Vanilla was formerly an important export. In 1932 only 1,974 lb. valued at £395 were exported and in 1933 only 21 lb. valued at £3.

There are some European-owned estates but most of the production is on peasant holdings and small locally-owned estates. Much of the interior of the island is undeveloped and the soil has been found to of poor fertility.

(e) *Montserrat.*

Despite the mountainous character of the island, nearly half of its area is under some form of agriculture. Ninety-four per cent. of the alienated land is in small-holdings of 10 acres or less.

Sea Island Cotton is the main crop, having been introduced to take the place of sugar in the early years of this century. Until lately it represented 90 per cent. of the exports but with declining demand, prices and production have fallen and in 1932 cotton represented less than 50 per cent. of the exports. It is not at present possible, however, to see any crop which can take its place. Steps are now being taken to ensure the supply and use of purer seed, the quality of the product having fallen off in recent years owing to insufficient attention being paid to this. Exports during recent years have been as follows:—

	<i>Quantity in lb.</i>	<i>Value in £.</i>
1929 ...	616,389	68,900
1930 ...	631,666	47,762
1931 ...	457,898	24,249
1932 ...	307,193	12,939
1933 ...	597,624	24,595

Limes were at one time largely cultivated and there is still a small export of limes, lime oil and lime-juice, the total value in 1933 being just over £7,000.

Tomatoes have been developed considerably in recent years and are exported principally to Canada. A packing house and cold storage plant have been established and the Agricultural Department is conducting varietal trials.

Production and exports during recent years have been as follows:—

	<i>Production. Crates of 20 lb.</i>	<i>Quantity in crates.</i>	<i>Exports. Value in £.</i>
1929 ...	900	*	*
1930 ...	4,252	*	*
1931 ...	16,966	16,966	2,832
1932 ...	22,764	9,037	5,824
1933 ...	8,110	7,335	1,145

Vegetables.—Montserrat soils are well suited to the production of vegetables. Onions grow well and exports were valued at £6,663 in 1927 but have since declined to about £300.

Other export products include bay leaf oil and papain but these are at present much depressed.

Ground provisions (yams, sweet potatoes, etc.) and other vegetables are grown for local consumption.

(f) *Virgin Islands.*

Agriculture is almost entirely in the hands of peasant cultivators and there is no organized production for export. Ground provisions, vegetables, and fruit are grown for local use and there is a small export of vegetables (£160 in 1933). Sugar is grown, but only for local consumption. Tobacco growing has been tried without success and there is no prospect at present of the development of this or other export crops, e.g., cotton or coconuts. Climatic conditions are unfavourable, and rainfall is often inadequate, and the islands being mountainous, any rain that does fall runs off too rapidly into the sea.

* Included under "Other vegetables."

2. FORESTRY.

There are no forests in Antigua or the Virgin Islands, but Dominica, St. Kitts, and Montserrat all contain large wooded areas. There is little commercial exploitation, but the Dominica forests contain several varieties of good timber trees, which are used for local buildings and exported in small quantities. In St. Kitts charcoal is the main forest product, and there is a small export of charcoal from the Virgin Islands (mainly to Barbados).

3. ANIMAL HUSBANDRY.

Horses, asses, and mules are kept for draught, and cattle, sheep, and goats are also kept but animal husbandry plays no important part in the economy of the islands, except in the Virgin Islands, whence numbers of goats, cattle, and sheep are exported. Poultry raising is also a minor industry in that Presidency.

4. MINERAL.

There are no mineral workings at present but known deposits include gypsum in Montserrat, molybdenum in the Virgin Islands and phosphates in Redonda.

5. FISHERIES AND MARINE PRODUCTS.

Fishing occupies a few men and boats in all the islands, but it is quite unorganized and aims only at supplying the local market, except in the Virgin Islands whence there is a small export to St. Thomas and St. Croix.

B.**FOOD SUPPLY.**

In all the islands there is considerable local production of ground provisions, vegetable, fruit, fish, and some dairy produce, poultry, eggs, etc. The main imports are of grain, flour, and meat. Some islands are more dependent than others on imported supplies. The Virgin Islands may be regarded as substantially self-supporting, Nevis, Dominica, and Montserrat as nearly so and St. Kitts and Antigua are least independent of imports.

VI.—Industry.

Industrial establishments include the following; except for the ice factories and electric light plants it will be seen that they are all establishments for the treatment of primary products for export or local consumption:—

- (i) Central sugar factories, 2 in Antigua, 1 in St. Kitts (the latter employing 450 persons).
- (ii) Small sugar factories, 1 in Antigua, 10 in Nevis, 4 in Montserrat, 10 in Virgin Islands.
- (iii) Ice factories and electric light plants, 1 in Antigua, 3 in St. Kitts, 3 in Dominica.
- (iv) Cotton ginneries, 3 in St. Kitts, 4 in Nevis, 7 in Montserrat, 1 in Virgin Islands, 1 in Anguilla.
- (v) Government packing stations in St. Kitts, Nevis, Montserrat, and Dominica.
- (vi) Lime factories, 10 in Dominica.

VII.—Other Economic Activities.

There is no large entrepôt trade, but St. Kitts has some trade of that nature with the Dutch and French West Indies, re-exports from that Presidency amounting in 1933 to £20,654, chiefly of spirits and other liquor.

The tourist trade plays no important part in the economy of any of the islands, but there are hotels at Antigua, St. Kitts, and Nevis and it has been hoped that an increasing number of visitors from Canada will be attracted.

VIII.—Communications.**(i) INTERNAL COMMUNICATIONS.**

- (a) *Antigua* has a fairly extensive road system with a mileage of 140 miles. There are also two light railway systems for the carriage of sugar-canes to the central factories.
- (b) *St. Kitts*.—There is a circular road, 30 miles long, round the main part of the island which a few branches and a light railway for the carriage of cane.
- (c) *Nevis* has also a road round the island with a few branch roads.
- (d) *Dominica* has 270 miles of roads of which 75 miles are motorable.
- (e) *Montserrat* has 68 miles of road, serving all but the more hilly districts.
- (f) *The Virgin Islands* have no roads fit for vehicles and communications are mainly by sea or on horseback.

(ii) EXTERNAL COMMUNICATIONS.

The most important steamship service is that of the Canadian National Steamships, which give a fortnightly service from St. Kitts, Nevis, Antigua, Montserrat, and Dominica to Bermuda and Canada in the one direction and Barbados, Trinidad, and British Guiana in the other. In addition to the main service of passenger and cargo steamers there is a separate fortnightly service of cargo vessels. Communication between the islands and Trinidad is also maintained by the Furness Bermuda Line (monthly) calling only at Antigua, St. Kitts, and Dominica.

There is no direct communication with the United Kingdom, except by the Harrison Line boats calling at Antigua every eight weeks, infrequent calls by Elders and Fyffes boats at Antigua, and the services of the Cie. Générale Transatlantique, calling at St. Kitts and Antigua, and the Royal Netherlands Steamship Company, calling at St. Kitts. Passengers to and from the United Kingdom commonly travel via Barbados or Trinidad.

Communication with New York is maintained by the Furness Bermuda and Munson Lines.

The Virgin Islands have no regular ocean communications; passengers and cargo are normally transhipped at St. Thomas, in the United States Virgin Islands. Small sloops maintain daily communication with St. Thomas (with which there is also a weekly service by Government launch) and irregular communication with the other West Indian islands.

Antigua is a point of call for the Pan-American Airways air service from Miami, Cuba, and Porto Rico to Trinidad and South America.

The ports, except at Antigua, are open roadsteads, where large vessels are unloaded by lighters. St. John's Harbour, Antigua, is extensive but shallow and large vessels have to anchor some 2½ miles from the town. There are other harbours in Antigua, in particular the fine English Harbour, but they are not of commercial use.

IX.—Tariff.

Each of the Presidencies has its own customs tariff, the general form of each being similar, i.e., all imports are dutiable except those included in detailed lists of exemptions, a large number of specific or special *ad valorem* rates are provided for various classes of goods, and all other goods not exempted are dutiable at *ad valorem* rates which are 10 per cent. for Empire goods and 15 per cent. for foreign goods in all Presidencies except the Virgin Islands, where the rates are 8 per cent. and 12 per cent. respectively.

Imperial preference is provided in the case of all dutiable goods by prescribing lower duties or free entry for goods of Empire origin. The margin of preference varies according to the article and the Presidency concerned, but the preferential rate is usually two-thirds of the foreign rate.

Customs surtaxes are in force in all Presidencies as follows:—

Antigua; 20 per cent. of the duty.
 Dominica; 15 per cent. of the duty.
 St. Kitts-Nevis; 25 per cent. of the duty.
 Montserrat; 10 per cent. of the duty.
 Virgin Islands; 2 per cent. of the duty.

X.—Trade Representatives, etc.

The West India Committee act as unofficial Trade Representatives of the Colony in London and the various Presidencies share with the other West Indian administrations in the maintenance of the West Indian Trade Commissioner in Canada.

The Colony is within the sphere of the United Kingdom Trade Commissioner in the West Indies, whose headquarters is at Trinidad.

TRINIDAD AND TOBAGO.

I.—Situation, etc.

Trinidad is the most southerly of the West Indian Islands and lies about 16 miles off the coast of Venezuela in latitude 10° N. and longitude 60-61° W. Tobago is some 21 miles north-east of Trinidad in latitude 11° N. and longitude 60° W.

The climate of both islands is tropical but healthy. There are two seasons, a dry season extending from about the beginning of January to the middle of May with an average rainfall of 2 to 3 inches per month, and a wet season with an average rainfall of about eight inches a month during the rest of the year. The average temperature is 84° F. during the day and 74° F. during the night.

The total area of the Colony is 1,267,236 acres or 1930.06 square miles. The area of Trinidad is 1,192,844 acres or 1,863.82 square miles distributed as follows:—

Forest Reserves:—										Acres.
Demarcated	...	...	...	...	...	...	...	...	...	153,088
Undemarcated	...	...	...	...	...	...	...	...	...	77,008
Proposed	...	...	...	...	...	...	...	...	...	47,416
Oil Concessions:—										
Under Mining Lease	...	...	...	...	...	...	...	...	...	117,887
„ Prospecting Licence	...	...	...	...	...	...	...	...	...	10,164
„ Exploration Licence	...	...	...	...	...	...	...	...	...	9,519
Alienated Lands—including roads and other reserves	...	...	...	...	...	...	...	...	...	649,608
Remaining Crown Land	...	...	...	...	...	...	...	...	...	204,167
										1,273,857
Less area under Concession included in Forest Reserves above	...	...	...	...	...	...	...	...	...	82,806
										1,191,051
The City of Port-of-Spain	...	...	...	...	...	...	...	...	...	1,793
Area of Trinidad	...	...	...	...	...	...	...	...	...	1,192,844

The area of Tobago is 74,392 acres or 116.24 square miles distributed as follows:—

										Acres.
Demarcated Forest Reserves	...	...	...	...	...	...	...	...	...	9,776
Alienated lands—including roads and other reserves	...	...	...	...	...	...	...	...	...	53,030
Remaining Crown Land	...	...	...	...	...	...	...	...	...	6,586
Area of Tobago	...	...	...	...	...	...	...	...	...	74,392

The total acreage of the alienated lands and the number of properties into which these lands are divided are shown below.

(a).

					<i>Acreage of lands used for agricultural purposes and number of building lots assessed for Taxes.</i>		<i>Number of Properties Assessed.</i>
					<i>Agricultural Lands.</i>	<i>Building lots.</i>	
					<i>Acres.</i>		
Trinidad ...	...	...	...	...	598,006	20,411	60,497
Tobago ...	...	...	...	...	52,666	618	7,974
					650,672	21,029	68,471

(b).

				<i>Number of owners of parcels containing 10 acres or less.</i>	<i>Number of owners of parcels containing over 10 acres but not exceeding 50 acres.</i>	<i>Number of owners of parcels containing over 50 acres but not exceeding 100 acres.</i>	<i>Number of owners of parcels containing over 100 acres.</i>
Trinidad ...	...	...	...	36,572	6,780	673	688
Tobago ...	...	...	...	6,406	218	21	72
Total ...	...	...	...	42,978	6,998	694	760

The approximate acreages under the principal agricultural crops of the Colony are as follows:—

							<i>Acres.</i>
Cocoa ...	...	...	...	...	...	...	220,000
Sugar ...	...	...	...	...	...	...	62,000
Coconuts ...	...	...	...	...	...	...	50,000
Coffee ...	...	...	...	...	...	...	1,200
Rice ...	...	...	...	...	...	...	9,000
Rubber ...	...	...	...	...	...	...	850
Limes ...	...	...	...	...	...	...	2,600
Grapefruit ...	...	...	...	...	...	...	1,400
Total ...	...	...	...	...	...	...	347,050

5. Under the Land Regulations now in force, rural lands of the Crown in parts of Trinidad and in Tobago may be purchased freehold under certain conditions.

The Crown reserves all gold, silver, and other precious metals, coal, oil, and other minerals upon or under lands so sold, and also the right of entry to prospect and win such minerals.

II.—Population.

The total population of the Colony at the census of the 26th of April, 1931, was 412,783 of which 25,358 resided in Tobago.

The aboriginal Carib population of the Colony has completely disappeared and the existing population consists of the descendants of African slaves, British Indians and their descendants, Europeans, and inter-racial mixtures. At the 1931 census 138,667 were returned as of East Indian origin. There is also a small Chinese community, the number of persons of Chinese origin at the 1931 census being 5,239. In addition to the above the population also comprised 2,217 persons born in the United Kingdom or elsewhere in Europe, 614 persons born in Canada or the United States of America and 5,082 persons born in Venezuela or elsewhere in South America.

The population is steadily increasing and by the end of 1933 it was estimated at 425,572. Immigration and emigration are now negligible.

The principal towns and their populations (estimate December, 1933) are Port-of-Spain, the capital, 72,518, San Fernando 14,799, Mucurapo 9,457, Tunapuna 6,237, Princes Town 5,178, and Arima 5,104.

III.—Finance.

A. CURRENCY AND BANKING.

1. So far as coinage is concerned the legal tender currency of the Colony is United Kingdom gold, silver, and bronze coinage and gold coins of the United States of America, but steps are now being taken to demonetize the latter.

From January, 1935, the Government Accounts which have hitherto been expressed in pounds, shillings and pence will be kept in dollars and cents at the rate of \$1.00 = 4s. 2d. or 1 cent = 1 halfpenny. Accounts are normally kept by the public in dollars and cents.

There is a legal tender issue of Government currency notes in denominations of \$1, \$2, and \$1,000, the total amount in circulation on the 31st December, 1933, being \$525,440. These are current in the Colony only. In the near future it is proposed to demonetize the \$1,000 notes.

Notes in denominations of \$5, \$20, and \$100 issued by Barclays Bank (Dominion, Colonial, and Overseas), the Royal Bank of Canada and the Canadian Bank of Commerce are also in circulation, but are not legal tender.

2. The three banks referred to in the preceding paragraph maintain branches in the Colony, and there is also a local private bank, Messrs. Gordon Grant & Company, Limited.

There is also a bank entitled "The Trinidad Co-operative Bank, Limited" with a paid-up capital of £37,999 raised by public subscription. Its principal object is to make advances to shareholders at a reasonable rate of interest but it also carries on a penny bank branch, paying interest at the rate of 4 per cent. per annum on deposits.

There is a Government Agricultural Bank entitled "The Agricultural Bank of Trinidad and Tobago" with a capital of £250,000 now provided by a loan raised locally.

The objects of the Bank are to make loans to agriculturists secured by first mortgages on properties and repayable over a period of 30 years, and also temporary advances on crops repayable within the crop season.

The total amount outstanding on the 31st December, 1933, was £227,842 in respect of loans on mortgages and £9,687 in respect of temporary advances.

There is a Government Savings Bank, the number of depositors on the 31st December, 1933, being 41,901 and the total amount on deposit £457,343.

There are 28 Agricultural Credit Societies financed by Government Advances repayable within a period of three years. The Societies make loans to their members for the purpose of planting and reaping crops. The total amount due to Government at the end of December, 1933, was £4,359.

In view of the low prices prevailing for cocoa Government has made advances free of interest to certain owners of land who are unable from their own resources to meet expenditure on maintenance of their cultivations. Advances are made against crops to the extent of their estimated value at prevailing market rates.

B. PUBLIC FINANCE.

1. Public Debt.

(a) At 31st December, 1933, the total public debt was £4,001,233 of which £1,393,640 was local.

	£
(b) Interest paid from General Revenue	93,761
Interest paid from Railway Revenue	58,413
Sinking Fund paid from General Revenue	39,880
Sinking Fund paid from Railway Revenue	25,316
(c) The accumulated sinking funds at 31st December, 1933, amounted to £1,250,266.	

2. Revenue.

(A) *Analysis of Revenue (on the basis of the Estimates for 1934).*

Self-balancing Departments.

Department.	Revenue. £	Expenditure. £	Surplus (+) or Deficit (—). £
Post Office	32,215	35,028	— 2,813
Railway	135,060	242,633	—107,573
Coastal Steamers	17,250	21,555	— 4,305
	<u>£184,525</u>	<u>£299,216</u>	
Net deficit ...	£114,691		

General Revenue.

	£	Percentage.
1. Customs and Excise—		
Import duties	600,000	37·4
Export duties	16,000	1·0
Excise duties	290,240	18·1
Other revenue	31,660	1·9
	<u>937,800</u>	58·4
2. Internal Revenue	184,134	11·5
3. Income-tax	140,000	8·7
4. Land sales	118,950	7·4
5. Fees of Court	126,264	7·8
6. Miscellaneous and other revenue*	97,055	6·2
	<u>1,604,203</u>	100
Revenue of self-balancing Departments set-off against Expenditure†	49,465	
	<u>£1,653,668</u>	

(B) *Analysis of Import Duties for 1933.*

Amount of duty collected on articles imported from:—

Class	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
I	60,718	70,301	205,913	336,932
II	1,235	1,614	8,133	10,982
III	103,825	25,457	118,316	247,598
IV	19	49	396	464
	<u>165,797</u>	<u>97,421</u>	<u>332,758</u>	<u>595,976</u>
Parcel Post—Various				11,470
				<u>607,446</u>

* Of this amount £96,820 is in respect of appreciation of securities.

† Exclusive of Railway Revenue.

3. *Expenditure.**Analysis of Expenditure (on the basis of the Estimates for 1934).*

	£	Percentage.
1. Deficit of self-balancing Departments (see 2(A)) ...	114,691	7·8
2. Debt Charges	156,433*	10·7
3. Administration	311,453	21·3
4. Economic Development	209,028	14·3
5. Social Services	553,861	37·8
6. Defence—Military	5,358	0·3
7. Non-effective	111,870	7·8
	£1,462,694	100
Expenditure of self-balancing Departments set-off against Revenue†	49,465	
	£1,512,159	

4. *Reserve Funds, etc.*

On the 31st December, 1933, there was a surplus of assets over liabilities amounting to £553,624 (apart from the Reserve Fund of £377,681). Of this, £137,777 consisted of advances made to the owners of sugar estates which are not repayable immediately.

5. *Grants-in-aid, etc.*

No grants-in-aid or loans-in-aid have been made from Imperial Funds. The Colony has received from the Colonial Development Fund free grants of £3,500 towards the cost of a Sugar Plant Central Quarantine Station as well as grants to the Imperial College of Tropical Agriculture to be expended as follows:—£3,000 towards the cost of an electric lighting plant; £6,725 for staff residences and Agricultural Buildings Extension; and £675 for Banana and Low Temperature Research.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1913	495,101	232,706	2,257,441	2,985,248
1930	1,309,828	1,110,831	2,767,847	5,188,506
1931	753,310	1,366,482	2,205,428	4,325,220
1932	1,155,422	1,125,612	1,875,373	4,156,407
1933	1,765,624	883,054	1,128,116	3,776,794

In addition there were exports for use as Ships' Stores, bunkers, etc., as follows:—

	£		£
1913	80,615	1932	420,804
1930	652,740	1933	821,627
1931	318,639		

(ii) *Domestic Exports by Classes, 1933.*

To:—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom	1,072,232	173,724	489,663	—	1,735,619
Canada	276,697	10,870	162,896	1	450,464
British West Indies	13,891	1,909	264,959	472	281,231
Rest of Empire	22,924	21,468	69,723	101	114,216
<i>Total Empire</i>	1,385,744	207,971	987,241	574	2,581,530
United States of America... ..	214,082	55,821	15,369	72	285,344
Canary Islands	—	—	137,331	—	137,331
Dutch West Indies	180	105,833	8,058	—	114,071
Senegal	—	—	82,719	—	82,719
French West Indies	331	247	65,534	178	66,290
France	48,276	6,152	6,173	—	60,601
Holland	33,412	22,271	666	—	56,349
Germany	53,009	1,200	—	—	54,209
Other foreign countries	52,983	36,899	32,934	666	123,482
<i>Total foreign countries</i>	402,273	228,423	348,784	916	980,396
Ships' Stores, bunkers, etc. ...	291	4	761,893	—	762,188
(Including stores shipped for the Admiralty).					
GRAND TOTAL	1,788,308	436,398	2,097,918	1,490	4,324,114

* In addition to this amount, £97,135 was paid by the Railway Department, and is included in item 1.

† Exclusive of Railway Department.

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>				<i>Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of destination with amounts</i> <i>in £'000.</i>
<i>Class I.</i>						
Sugar—						
	Grey Crystals	...	...	91,391 tons	889,506	United Kingdom (719), Canada (170).
	Yellow Crystals	...	...	14,761 tons	195,416	United Kingdom (195).
	Other kinds	...	...	2,364 tons	30,645	United Kingdom (all).
	Molasses	...	...	3,026,077 gal.	31,634	United Kingdom (19), Canada (12).
					1,147,201	
	Cocoa, raw	...	...	22,907 tons	555,907	United States of America (204), Canada (81), United Kingdom (69), Germany (52), France (48), Holland (32).
Spirits—						
	Bitters	...	...	11,899 gal.	21,205	United Kingdom (14).
	Rum	...	...	63,907 gal.	12,853	United Kingdom (11).
	Cordials and Liqueurs	...	...	16 gal.	18	
				75,822 gal.	34,076	
<i>Class II.</i>						
	Petroleum, crude	...	...	40,899,184 gal.	186,842	Dutch West Indies (106), United Kingdom (45), United States of America (25), Canada (10).
Asphalt—						
	Dried	...	...	44,601 tons	133,803	United Kingdom (69), United States of America (21), Holland (19).
	Cement	...	...	7,389 „	17,064	Australia (6), Union of South Africa (3), United States of America (3).
				51,990 „	150,867	
	Copra	...	...	8,642 „	82,945	United Kingdom (49), Colombia (26).
<i>Class III.</i>						
Oil—						
	Fuel	...	...	193,395,203 gal.	1,003,105	Bunkers (450), United Kingdom (Admiralty) (171), Canary Islands (137), British West Indies (94), Senegal (83), Bermuda (26).
	Kerosene	...	...	2,886,691 gal.	82,275	British West Indies (42), French West Indies (14), British Guiana (11).
	Motor Spirit	...	...	74,188,469 gal.	973,336	United Kingdom (481), Canada (162), United Kingdom (Admiralty) (132), British West Indies (117), French West Indies (48), British Guiana (21).
	Lubricating...	...	...	8,108 gal.	558	
	Road	...	...	447,789 gal.	7,939	British West Indies (5).
				270,926,260 gal.	2,067,213	

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	<i>United Kingdom.</i> £	<i>Rest of Empire.</i> £	<i>Foreign Countries.</i> £	<i>Grand Total.</i> £
1913	892,593	435,356	1,500,601	2,828,550
1930	1,890,792	1,233,479	2,087,520	5,344,533*
1931	1,377,370	973,808	1,466,454	3,917,439*
1932	1,583,788	844,037	1,181,760	3,695,137*
1933	1,779,887	826,555	1,321,457	4,001,721*

(ii) *Imports by Classes, 1933.*

<i>From:—</i>	<i>Class I.</i> £	<i>Class II.</i> £	<i>Class III.</i> £	<i>Class IV.</i> £	<i>Total Merchandise.</i> £
United Kingdom	321,709	47,869	1,408,362	1,947	1,779,887
Canada	307,649	38,893	130,175	325	477,042
British East Indies	105,693	—	55,786	—	161,479
British Guiana	75,461	5,414	6,987	135	87,997
British West Indies	23,551	12,288	18,188	735	54,762
Rest of Empire	28,612	2,883	13,753	27	45,275
<i>Total Empire</i>	862,675	107,347	1,633,251	3,169	2,606,442
United States of America...	99,023	78,772	330,196	5,485	513,476
Venezuela	174,345	91,825	6,513	1,638	274,321
Japan	50	—	117,232	—	117,282
Holland	65,846	3	37,675	—	103,524
Germany	3,473	494	88,905	—	92,872
France	31,899	527	12,598	30	45,054
Other foreign countries	88,976	2,025	83,912	15	174,928
<i>Total foreign countries</i>	463,612	173,646	677,031	7,168	1,321,457
Parcel Post	—	—	73,822	—	73,822
GRAND TOTAL	1,326,287	280,993	2,384,104	10,337	4,001,721

* Includes unclassified Parcel Post from all countries as follows:—

1930 ... £132,742 1931 ... £99,807 1932 ... £85,552 1933 ... £73,822

(iii) *Principal Imports, 1933.*

<i>Class I.</i>	<i>Article.</i>	<i>Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of origin with amounts in £'000.</i>
<i>Grain, Flour, Pulse, etc.</i>				
<i>Grain—</i>				
	Rice	339,222 cwt.	147,855	British East Indies (75), British Guiana (69).
	Oats	38,343 cwt.	13,386	Canada (13).
	Other kinds	24,489 cwt.	7,527	Argentine (7).
<i>Pulse—</i>				
	Beans, peas, etc.	30,540 cwt.	21,110	United Kingdom (17).
	Dholl	18,914	13,715	British East Indies (13).
<i>Flour and meal—</i>				
	Wheaten	340,298 bags of 196 lb.	282,640	Canada (184), United Kingdom (98).
	Farinaceous preparations...	4,410 cwt.	9,265	Canada (3), United Kingdom (2), United States of America (2).
	Other kinds... ..		3,500	United States of America (3).
			498,998	
<i>Cocoa—</i>				
	Raw	4,501 tons	101,852	Venezuela (100).
	Prepared	34 tons	2,266	United Kingdom (2).
			104,118	
<i>Meats—</i>				
	Beef and Pork			
	Preserved	29,609 cwt.	53,491	United States of America (24), Argentine (11), United Kingdom (8), Canada (7).
	Smoked or cured	8,968	26,059	United States of America (9), United Kingdom (7), Argentine (4), Denmark (2), Brazil (1).
	Other kinds... ..	5,687	14,937	United Kingdom (7), Argentine (7).
		44,264 cwt.	94,487	
<i>Fish—</i>				
	Dried, salted, smoked, etc.	54,563 cwt.	70,486	Canada (43), Newfoundland (16), United King- dom (10).
	Canned or preserved	4,707 cwt.	13,580	Canada (9).
	Fresh	805 cwt.	1,458	British West Indies (1).
		60,075 cwt.	85,524	
<i>Milk, condensed</i>				
		97,561 cases of 48 lb.	83,324	Holland (41), United Kingdom (13), Denmark (12).
<i>Animals and birds, living, for food—</i>				
	Cattle	7,534	72,606	Venezuela (70), British Guiana (2).
	Other kinds... ..		10,592	British West Indies (8).
			83,198	
<i>Butter and substitutes—</i>				
	Butter	10,862 cwt.	62,838	United Kingdom (47), France (12).
	Oleomargarine	1,669 cwt.	4,524	United Kingdom (3).
	Ghee... ..	804	3,877	British East Indies (all).
		13,335 cwt.	71,239	
<i>Vegetables.</i>				
<i>Fresh—</i>				
	Potatoes	73,085 cwt.	21,584	Holland (10), Canada (7).
	Onions and garlic	27,791 cwt.	15,691	Holland (6), Portugal (4).
	Other kinds... ..	—	15,228	British West Indies (7), British Guiana (3).
	Dried, canned, etc.	1,059	2,753	United Kingdom (1), Canada (1).
			55,256	
<i>Tobacco—</i>				
	Unmanufactured	598,657 lb.	32,221	United States of America (27).
	Cigarettes	14,060 lb.	6,148	United Kingdom (6).
	Other kinds	4,242 lb.	1,785	
		616,959 lb.	40,154	
<i>Class II.</i>				
<i>Wood and Timber, unmanu- factured—</i>				
	Dressed	5,516,714 feet	49,854	United States of America (33), Canada (15).
	Undressed	5,577,373	48,018	United States of America (23), Canada (18).
	Shooks, Staves, etc.	—	23,728	United States of America (18), Canada (4).
			121,600	
<i>Petroleum, crude</i>				
		14,263,018 gal.	83,974	Venezuela (all).
<i>Coal</i>				
		41,406 tons	45,005	United Kingdom (42).

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of origin with amounts</i> <i>in £'000.</i>
<i>Class III.</i>			
Machinery—			
Mining	—	363,930	United Kingdom (231), United States of America (119).
Sugar	—	40,845	United Kingdom (39).
Other Industrial and Manufacturing.	—	38,775	United Kingdom (35).
Electric Lighting and Power	—	17,241	United Kingdom (15).
Agricultural	—	9,445	United States of America (6), United Kingdom (3).
Marine	—	5,680	United Kingdom (3).
Railway and Tramway ...	—	5,266	United Kingdom (3).
Other kinds... ..	—	17,227	United Kingdom (16).
		<u>498,409</u>	
Cotton Manufactures—			
Piece Goods	9,714,753 l. yd.	170,615	United Kingdom (136), United States of America (24), Japan (5), British Guiana (4).
Other kinds... ..	—	53,860	United Kingdom (28), British West Indies (13).
		<u>224,475</u>	
Metal Manufactures (all kinds)	—	169,069	United Kingdom (132), United States of America (10), Canada (9).
Motor Cars, etc., and parts...	—	116,452	United Kingdom (55), Canada (46), United States of America (1).
Silk and Artificial Silk Manufactures.	—	110,387	Japan (73), United Kingdom (20).
Boots and Shoes	37,686 doz. pr.	77,432	United Kingdom (53), Czecho-Slovakia (12).
Painters' Colours and Materials	—	75,569	Germany (32), United Kingdom (27).
Paper Manufactures	—	65,189	United Kingdom (33), United States of America (8).
Apparel	—	62,959	United Kingdom (26), Japan (17), United States of America (13).
Bags and Sacks	163,659 doz.	60,113	British East Indies (50).

V.—Natural Resources.

A.

1. AGRICULTURE

Cocoa was until 1930 the most important agricultural industry in the Colony but is now second to sugar. The total area under cocoa in Trinidad was estimated at 210,000 acres at the end of 1933. No survey has been made in Tobago but the area is estimated at 10,000 acres.

The total number of cocoa properties in Trinidad alone is slightly over 16,000 of which about 6,000, over 10 acres in extent, are intermingled with and surrounded by approximately 10,000 small-holdings of under 10 acres. The industry gives employment to between 25,000 and 40,000 persons, including small-holders.

Many of the largest and best estates are in the hands of Creoles of French descent, while the peasantry consists mainly of East Indians and West Indians. The economic survey carried out by the Government in 1930 has shown that probably one-fifth of the area under cocoa is uneconomic. Existing low prices considerably increase this fraction. A certain quantity of the cocoa has been planted on unsuitable land and there are few estates which have not, even in normal times, non-paying areas. At the present time, although expenses have been reduced to a minimum, there are probably few estates which can be worked at a profit if there is interest on mortgages to be paid.

The industry has been put to additional expense by the prevalence of witchbroom disease which first appeared in 1928 and is now established in most areas. At the end of 1933 the disease was found in varying degrees of intensity on 4,445 estates involving 145,781 acres as compared with 3,887 estates of 134,507 acres at the end of 1932. Witchbroom has not yet been reported in Tobago.

To help the industry to tide over the present crisis, the Government has provided for assistance to economically sound estates under the Cocoa Industry Relief Ordinance, 1931, advances being given against estimated crops and ranking as a prior mortgage against the property. If present conditions continue, however, it is feared that many of the less efficient planters will be forced to abandon cultivation.

The Government and the Cacao Research Staff of the Imperial College of Tropical Agriculture are carrying out investigations on a large scale, not only on witchbroom diseases, but also on the relative productiveness of cocoa trees, on the selection of high-yielding strains and on other points of importance in cocoa cultivation.

The interests of the industry are being assisted by a co-operative association registered under the Companies Ordinance of the Colony and entitled "The Cocoa Planters' Association of Trinidad." Among its other functions the Association bulks, grades, and disposes of cocoa grown by its members; in 1933 it handled 88,364 cwt. of cocoa, representing about 19.25 per cent. of the total crop. The small-holders' cocoa has no such advantages; it is brought to the market as "shop cocoa" having passed through one or two village shops to the Port-of-Spain dealers. It is generally indifferently prepared, ungraded, and of poor quality. There is considerable

room for the organization of small-holders' co-operative marketing societies and for the erection of central fermentaries, in the development of which a little progress has been made. Practically all cocoa produced is exported, only a small quantity being consumed locally.

Exports of cocoa in recent years have been as follows:—

		Quantity in tons	Value in £.			Quantity in tons	Value in £.
1929	...	27,629	1,446,127	1932	...	18,670	579,170
1930	...	24,029	1,136,056	1933	...	22,907	555,907
1931	...	25,529	826,333				

Although, as the figures indicate, there has been a disastrous fall in values, the value per ton of the 1933 crop being slightly more than one-third that of the 1929 crop, Trinidad cocoa still retains a considerable advantage in price over the "ordinary" cocoa of West Africa.

Sugar is now the most important crop, the area under sugar-cane at the end of 1933 being approximately 62,000 acres. The cane-growing area is confined to the western part of the Colony and is in three sections, the Naparima to the south, the flat lands of the central belt, and the Caroni plain to the north. The industry is mainly controlled by large companies, most of which have their headquarters in the United Kingdom. These companies own central factories at which they grind both canes grown on their own estates and canes bought from cane farmers, who, in some cases, lease land from the companies.

It is estimated that 40 to 45 per cent. of the cane is produced by small cane farmers, of whom, in 1933, 11,399 were returned as East Indians and 5,808 as West Indians. Payment for these canes is nominally based on a sliding scale of prices varying with the price of raw sugar, but for some years a price of 12s. per ton has been operative and this has not been reduced despite the heavy fall in the price of sugar since it was fixed. There has been considerable increase in the production of canes by small farmers in the last 20 years and energetic efforts have been made by some factories, particularly in the south of the island, to encourage them through agricultural credit societies and by other means to improve their methods of cultivation. The production of canes by farmers is, however, in danger of being overdone.

Information available indicates that the cane farmers' production is inferior, both in yield per acre and in sugar content, to that of the estates, owing to the occupation of less fertile land and to the use of inferior varieties and less efficient cultivation methods. The example of neighbouring estates has so far had little effect in raising standards.

On the estates marked advances have been made in cultivation methods and in the introduction of improved varieties. Factory equipment is generally good. Considerable work has been done in the trial of high-yielding canes possessing qualities suitable to conditions in different parts of the Colony. Much attention has also been given to the use of fertilizers and to the frog-hopper pest, which has been a cause of much damage to sugar-cane for many years. The work is now concentrated under the Sugar-cane Investigation Committee and its cost is shared equally between the industry and the Colonial Government. A grant not to exceed £1,800 per annum was recently made from the Empire Marketing Fund towards the cost of this and other investigations of importance to the sugar industry.

The total amount of cane produced in the Colony in 1933 was approximately 1,154,261 tons of which about 488,174 tons or 42 per cent. were produced by small cane-owners. The total sugar manufactured was 120,763 tons, of which 108,516 tons were exported and 12,247 tons consumed locally.

Production has been steadily increasing of recent years, and with the help of the special Colonial preference granted to Colonial sugar by the United Kingdom Finance Act, 1932, the industry is in a stronger position than it has been for some years past.

Total production and exports in recent years have been as follows:—

		<i>Production.</i>	<i>Exports.</i>			<i>Production.</i>	<i>Exports.</i>		
		<i>Tons.</i>	<i>Tons.</i>	£		<i>Tons.</i>	<i>Tons.</i>	£	
1929	...	89,926	81,503	1,049,863	1932	...	97,588	85,956	845,874
1930	...	79,848	69,139	776,167	1933	...	120,763	108,516	1,115,567
1931	...	98,573	86,054	902,990					

Products of the coconut palm take third place but do not compare in importance with cocoa and sugar. The area under coconuts at the end of 1933 was estimated at 50,000 acres.

The experience of the Colony with coconut palms has not been altogether fortunate. There was a marked extension of coconut plantations some years ago owing to the comparatively high price of the products and what was then regarded as the unsatisfactory prices of cocoa and sugar, and considerable areas were cleared of sugar-cane and planted with coconuts, but much of the land has proved unsuitable and many of the palms succumbed to "wilt" disease after they had come to maturity. The problem is still under investigation, but it is now concluded that careful selection of land for coconuts is essential and that, while they are highly productive on such selected lands, the area for further extension in the Colony is limited.

The nuts are consumed and exported to a certain extent in their natural form, but the greater part of the crop is converted into copra. Part of this is used locally in the factories belonging to the West Indian Oil Industries, Limited, and Messrs. Alston and Company, for the manufacture of soap and edible oils and fats, but the greater part is exported either as copra or as coconut oil. The above factories regularly employ about 150 labourers. The amount of copra consumed by the local factories in 1933 was about 4,000 tons.

Trinidad copra is of good quality but does not rank as high as the best grades from the East. At present exports are classified as f.m.s., but trade advices indicate that the establishment of a Trinidad plantations grade would result in improved market prices.

Assuming that three nuts are required to manufacture 1 lb. of copra and 45 nuts to produce 1 gallon of coconut oil, the equivalent in nuts of all coconut products exported during recent years has been as follows:—

	<i>Number of nuts.</i>	<i>Value in £.</i>		<i>Number of nuts.</i>	<i>Value in £.</i>
1929 ...	87,110,000	281,455	1932 ...	51,294,708	106,786
1930 ...	73,412,000	207,733	1933 ...	68,013,345	108,009
1931 ...	63,874,000	115,515			

Citrus.—The grapefruit industry of the Colony is one of considerable promise and continues to develop steadily from year to year. The plantations now cover 1,500 acres or more, most of which are planted in Marsh, one of the most popular market varieties. The industry has been assisted by Government from its inception, budded plants, sold at a cheap rate, being distributed in large numbers annually from the nurseries of the Department of Agriculture.

A co-operative association, the Co-operative Citrus Growers' Association of Trinidad and Tobago, formed and financed with the help of Government, is responsible for the export of all budded grapefruit and oranges destined to open markets abroad, the authority being given under the Export of Fruit Ordinance No. 23 of 1931. The packing house of the Association was built in 1931 and the table below shows the fruit handled by it for the three years it has been in existence.

	<i>Boxes.</i>
1931-32 ...	13,062
1932-33 ...	7,432
1933-34 ...	33,358

In 1933 it was found that the packing house with a capacity of 600 boxes a day could not cope for long with the annual crop increase particularly in view of the infrequent opportunities of shipment to the United Kingdom in refrigerated space. Plans have, therefore, been made to increase the capacity with the help of funds from the Colonial Development Board.

The preferences granted in the United Kingdom by the Import Duties Act and the Ottawa Agreement Act have been of considerable help in developing the industry, although these are to some extent offset by a high freight rate to the United Kingdom. Market reports and sale returns continue to bear testimony to the excellent qualities of Trinidad grapefruit.

There is a small trade in Trinidad *oranges* to Canada and large numbers of seedling oranges go to the neighbouring West Indian colonies.

Research work on propagation and cultivation methods is being conducted by Government on its Citrus Experiment Station at St. Augustine, approximately 45 acres of land are devoted to grapefruit and oranges, most of which was planted in 1932.

There has been considerable extension of *lime* planting during recent years owing to the high prices realized for lime oil and production is likely to increase in the future as the new plantings come into bearing. Government policy based on the recommendations of the Jamaica Fruit and Vegetable Conference of 1933, is to advise curtailment of planting and a very much reduced number of plants is being raised and distributed from the Government Nurseries. The demand for concentrated lime juice has almost ceased owing to the increasing use of the fermentation process for the manufacture of citric acid from sugar. A small trade is developing in citrate of lime and there are small exports of raw juice, otherwise the juice after distillation is dumped. Green limes continue to fetch good prices in the United States of America during the months February to June, unfortunately at a time when the West Indian lime is not in full bearing. A new hybrid T.1 produced by the Department of Agriculture, fruits throughout the year and, as it has proved acceptable to the trade, some planters are developing it on a small scale with the object of exporting limes at the season of best prices.

Exports of citrus fruits and products during recent years have been as follows:—

<i>Grapefruit.</i>				<i>Oranges.</i>	
<i>Cases.</i>	<i>Value.</i>		<i>Number.</i>	<i>Value.</i>	
	£			£	
1929 ...	809	606	1,367,318	1,992	
1930 ...	2,784	960	1,813,254	2,498	
1931 ...	4,377	1,876	2,454,692	2,429	
1932 ...	10,973	8,698	2,951,846	3,689	
			1,579 boxes	1,216	
1933 ...	3,433	2,586	1,913,179	2,347	
			650 boxes	485	

Lime-juice.

<i>Raw.</i>				<i>Concentrated.</i>		<i>Green limes.</i>	
<i>Gallons.</i>	<i>£</i>	<i>Gallons.</i>	<i>£</i>	<i>Barrels.</i>	<i>£</i>		
1929 ...	—	55,455	11,562	61	119		
1930 ...	47,554	4,096	21,762	3,759	228		
1931 ...	22,931	2,007	4,012	458	128		
1932 ...	49,629	4,250	8,583	427	145		
1933 ...	17,375	1,203	11,709	622	2,381		

Distilled and hand-pressed lime oil.

<i>Gallons.</i>			<i>£</i>	<i>Gallons.</i>			<i>£</i>
1929	...	797	9,516	1932	...	929½	12,840
1930	...	1,647	19,457	1933	...	1,889	22,575
1931	...	2,413	32,071				

In 1933 exports of distilled oil were 1,822 gallons valued at £21,415 and those of hand-pressed oil 67 gallons valued at £1,160; exports of citrate of lime were 52,800 lb. valued at £389, as against 54,217 lb. valued at £424 in 1932.

Coffee is a crop of small but increasing importance. A very small acreage (estimated at 1,200 acres in 1933) of this crop is grown as a pure stand; usually it is grown as a "filler" in odd spots on cocoa estates. In recent years more interest has been shown in *Robusta* coffee and *Arabica* is only being planted at the higher elevations. Exports in recent years have been:—

	Quantity in cwt.	Value in £.		Quantity in cwt.	Value in £.
1929 ...	7,300	32,288	1932 ...	8,111	20,822
1930 ...	4,381	12,475	1933 ...	3,028	7,416
1931 ...	7,621	16,080			

The experimental shipments of *bananos* to the United Kingdom commenced in 1932 were continued in 1933 and towards the end of the year Messrs. Elders and Fyffes undertook to accept trial shipments on consignment. The fruit arrived in good condition and the shipments proved a financial success. Conditions generally in the Colony are not ideal for banana cultivation, but scattered through the cocoa fields is a large number of various kinds of bananas grown for ground shade, and it is believed that the substitution of Gros Michel for other varieties, coupled with attention to the cultural needs of this crop, would result in the development, at but little cost, of a new and profitable subsidiary export industry.

Among minor agricultural exports are *molasses* and *rum* which were valued at £31,000 and £12,000 respectively, in 1933 and *tonca beans* which fell from £12,000 in the previous year to £3,000 in 1933 owing to the year being an off season for this crop. Considerable interest has been shown in recent years in the planting of *tonca beans*. Small quantities of *blackeye peas*, *nutmegs*, *ground provisions* and miscellaneous fruits are exported.

Eight hundred and fifty acres were returned as under *rubber* in 1933; 99 cwt. were exported in 1930 but there were no exports of rubber in 1931, 1932, or 1933.

There is a considerable production of food-stuffs for local consumption, including ground provisions, bananas, and other fruits and rice (which covered 9,000 acres in 1933).

Situated in Trinidad is the Imperial College of Tropical Agriculture, the principal centre of instruction in tropical agricultural work in the Empire, to which students come from all parts of the Empire and from which are drawn many recruits for Colonial Agricultural Departments. The College, in addition to its teaching work, does a considerable amount of research work, especially on plants of West Indian interest, e.g., bananas and sugar, and has a model sugar factory for the study of sugar technology. It has been closely associated with the anti-froghopper campaign in Trinidad. It also works in association with the Agricultural Departments of the Leeward and Windward Islands through the West Indian Commissioner of Agriculture, who is a member of the College staff.

2. FORESTS.

(a) *Natural Resources*.—The total area of forest land in Trinidad is approximately 900 square miles which is roughly half of the Colony. Of this 457 square miles have been set aside as permanent Forest Reserves, both on account of their indirect utility and for the production of timber and other forest produce.

The great part of the forest is tropical rain forest, but there is also a small area of semi-deciduous forest. In the rain forest area *mora* (*Mora excelsa* Benth.) covers 130 square miles the remainder being covered by mixed forest. The *mora* forest is of special importance as *mora* grows gregariously compared to the mixed forest in which there is a large number of different species per acre.

(b) *Existing position*.—The annual consumption of home-grown timber is about two million cubic feet, and in addition some one million cubic feet of coniferous timber (mainly pitch pine and douglas fir) are imported for building and other purposes including therein a number of shooks for box making. The native timbers mainly in demand include the following:—Balata (*Mimusops balata* var. *Cruegeri* Pierre), cedar (*Cedrela mexicana* Roem.), *mora* (*Mora excelsa* Benth.), crappo (*Carapa guianensis* Aubl.), guatecare (*Eschweilera subglandulosa* (Steud.) Miers.), cypre (*Cordia alliodora* Cham.), galba (*Calophyllum antillanum* Britton.), laurier (*Lauraceae* spp.), and fustic (*Chlorophora tinctoria* Gaud.). A local match factory uses a fair amount of jereton (*Didymopanax morototoni* Dene. and Pl.). In addition there is a large consumption of round wood poles, etc., for native huts, of corduroy for road making, and of cordwood for burning clay.

Charcoal and firewood form the main fuel of the Colony and a very large amount of timber is used for this purpose.

In the last 22 years forest revenue has exceeded expenditure by approximately £96,000.

Exploitation of the *mora* forest has developed considerably during the last few years, and high grade lumber is now being produced which competes with the imported article.

The Forest Department is replanting at the rate of 200 acres a year, and wherever possible the Forest Reserves are managed on the basis of a sustained yield. Stock-taking has been carried out over approximately 180,000 acres.

(c) *Potential Development*.—There is room for extended utilization of forest products both locally and, in special cases, for export. In this connexion certain of the more plentiful timbers are being examined at the Forest Products Laboratory at Princes Risborough and a major test on *mora* has been carried out; the report, however, has not yet been issued.

Apart from the utilization of existing timber, the formation of fast growing plantations of species such as teak (*Tectona grandis* Linn.), mahogany (*Swietenia mahagoni* Linn.), cedar, crappo galba, etc., offers distinct scope for profitable development.

3. ANIMAL HUSBANDRY.

Although there is comparatively little production of meat in the Colony, there is considerable use of draught animals and some dairying.

The amount of land available in Trinidad for pastoral purposes is negligible and Trinidad will always be dependent for its meat supply on South America, viz., British Guiana, Venezuela, Brazil, and the Argentine.

Live animals are imported and killed locally, suitable abattoirs and markets being available in the towns and the larger villages for the disposal of animal products; 7,451 animals valued at £73,819 were imported in 1932, of which 7,040 valued at £71,587 came from Venezuela, and 17,020 valued at £80,736 (7,308 valued at £70,828 from Venezuela) in 1933.

Tobago is self-supporting for its meat and steps are being taken to improve the local stock by grading up with imported Sussex cattle.

Several dairies are established in the Colony notably on sugar estates, which find it possible to use in this way the abundance of green stuff from cane tops in the crop season. Both Trinidad and Tobago should in time be self-supporting in milk and milk products. Good work is being done by the Government Stock Farm in breeding stock for both dairying and draught purposes. Progress is being made with crosses between Friesian and Zebu cattle suitable for dairy purposes under local conditions. Zebu cattle for draught are maintained at a high standard and the value of Indian breeds for improvement of draught stock has been demonstrated.

The Colony is practically free from all forms of proclaimed diseases, but paralytic rabies, a disease of cattle and equines, is at present under investigation.

The numbers of live-stock returned in the general Census of the Colony taken in 1931 were as follows:—

Cattle	24,025	Mules	4,622	Pigs	20,414
Horses	3,312	Donkeys	6,691	Sheep	3,360
				Goats	13,939

4. MINERALS.

Trinidad is the largest producer of mineral oil within the Colonial Empire and contains the only large deposit of natural asphalt in the Empire, the "Pitch Lake". Only one other such lake is known to exist (in Venezuela), although there are many smaller and less pure deposits elsewhere.

Petroleum.—The first well was drilled for oil in 1867 but the industry did not become established until 1908 when the first large well was drilled: by 1912 exports of petroleum exceeded 425,000 barrels and in 1933 they exceeded 8,900,000 barrels. The oilfields are in the south of the Island.

The production of petroleum is almost entirely in the hands of large companies and by the end of 1933 there were 14 companies actively engaged in the exploitation of oil in the Island. These companies, having a total share capital of more than £6,500,000, held over 132,338 acres of Crown lands under licences and leases, of which about 127,684 acres were held under mining lease. In addition there are appreciable holdings on private lands. Until 1902 oil rights were not reserved by the Government when disposing of Crown land, but after that date all Crown Grants reserved the oil rights to the Crown. There are consequently three categories of oil lands, viz., those in which the oil rights rest in the surface owner, those in private ownership in which the oil rights are reserved to the Crown, and those in which both the surface and oil rights remain with the Crown.

The following table shows the principal oil-producing companies now operating in the Island with the nature of the lands which they exploit and the location of those lands:—

<i>Name of Company.</i>	<i>Nature of lands held.</i>	<i>Location of lands.</i>
Trinidad Leaseholds Limited	Crown and private	Fyzabad, Barrackpore, Guaya-guayare, etc.
Apex (Trinidad) Oilfields, Limited	Crown and private	Fyzabad, Siparia.
United British Oilfields of Trinidad, Limited	Crown.	Parry Lands, etc.
Trinidad Lake Petroleum Company, Limited	Private	Brighton
Trinidad Petroleum Development Company, Limited	Crown and private	Oropouche, Palo Seco, etc.
Trinidad Central Oilfields Limited	Crown	Tabaquite, Guapo, etc.
Kern (Trinidad) Oilfields, Limited	Crown and private	Guapo, etc.
Trinidad Oilfields Operating Company, Limited	Crown and private	Palo Seco, Fyzabad, San Francique, etc.
New Dome Oilfields, Limited	Private	Fyzabad.
Siparia Trinidad Oilfields Limited	Crown	Palo Seco.
Trinidad Investments Limited	Private	Fyzabad.

There are refineries at Pointe-à-Pierre, Point Fortin, Brighton, Guapo, Tabaquite, and La Brea and all grades of petroleum products from motor spirit to road oil are produced, including a special kind of enriched crude oil which is sent to Canada.

The total number of wells drilled in the Island up to and including the 31st of December, 1933, is 1,983 of which 1,255 were on Crown lands. During 1933 81 new wells were drilled, 58 on Crown lands and 23 on private lands.

In 1933 the total quantity of oil produced was 9,561,354 barrels of which 5,290,743 barrels were produced from lands in which the oil rights rest with the Crown. £89,588 was paid by way of royalties and £1,570 by way of way-leaves to the Government during this year. The total amount of crude oil and products exported in 1933 was 8,909,298 barrels valued at £2,254,055 representing 52·13 per cent. by value of the total domestic exports of the Colony. Accurate figures regarding local consumption of oil are not available, but the approximate figure in 1933 was 742,000 barrels.

The total exports of crude oil and petroleum products during recent years have been as follows:—

	<i>Quantity in barrels.</i>	<i>Value in £.</i>		<i>Quantity in barrels.</i>	<i>Value in £.</i>
1929	8,243,023	3,051,450	1932	9,637,474	2,382,846
1930	7,678,807	2,790,695	1933	8,909,298	2,254,055
1931	8,964,303	1,949,455			

Asphalt.—The pitch lake situated in the ward of La Brea, comprising 114 acres, was first leased as a whole in 1888.

The existing grant of 109 acres to Trinidad Lake Asphalt, Limited, was made in 1925 for a period of 21 years from the 1st of February, 1930, on payment of the following sums:—

	<i>Per ton.</i>			<i>Per ton.</i>	
	<i>Royalty.</i> s. d.	<i>Export Duty.</i> s. d.		<i>Royalty.</i> s. d.	<i>Export Duty.</i> s. d.
Crude Asphalt	2 6	5 0	Dried Asphalt	3 6	6 11

The crude asphalt is dug out of the surface by manual labour and used or exported either without further preparation or after it has been dried in large containers by steam heat. Asphalt cement is also prepared by mixing dried asphalt with flux oil and is used for road purposes.

The total amount produced in 1933 was 111,337 tons of which approximately 38,660 tons was used by the Public Works Department on the roads of the Colony.

It is hoped that with the wide extension of preferences resulting from the Import Duties Act in the United Kingdom and the agreements concluded with various Dominions and India at Ottawa the natural asphalt produced by the Colony will be able to compete successfully with the residual asphalt produced from mineral oil predominantly of foreign origin which has been used so widely in the past; it will be seen that from 1931 onwards there was a serious falling off in exports.

Exports of asphalt during recent years have been as follows:—

	<i>Quantity in tons.</i>	<i>Value in £.</i>		<i>Quantity in tons.</i>	<i>Value in £.</i>
1929 ...	164,311	432,085	1932 ...	52,679	131,651
1930 ...	118,055	313,397	1933 ...	52,129	150,867
1931 ...	94,584	236,597			

A variety of asphalt known as *manjak* exists in Trinidad but has not been worked since 1920.

Other Minerals.—Small deposits of coal, iron, graphite, and gypsum and traces of gold exist, but they are not of commercial importance. Limestone and road metal are worked for local use, the production in 1933 being 201,209 tons valued at £18,809. The quarries, except in Port-of-Spain and San Fernando, are almost entirely Government owned.

The number of persons employed in the various industries connected with petroleum and asphalt is approximately 6,950.

5. FISHERIES.

There are both sea and river fisheries in the Colony but no information is available as to the quantity produced or the number of persons employed.

B.

FOOD SUPPLY.

The Colony is not self-supporting in food-stuffs and certain articles, notably wheat, could not in any circumstances be produced locally.

The largest group in the list of imported food-stuffs comprises grain, flour, rice, pulse, etc., imports of which were valued at a little over £500,000 in 1931 and 1932, and just under £500,000 in 1933, the principal sources of supply being Canada for grain and flour and India and British Guiana for rice. Other important items are condensed milk (£92,000 in 1933), meat (over £100,000), cattle for food (£81,000), butter and butter substitutes (£76,000), and vegetables (£66,000).

Most agricultural labourers can obtain land for growing their own food supplies, and, if steps were taken to develop the growing of food-stuffs on a more general scale, large quantities of food which are now imported could be produced economically in the Colony. The Colony could not, however, in any circumstances become entirely self-supporting.

VI.—Industry.

There are a number of establishments of an industrial or semi-industrial nature falling within three main classes:—

(a) Those employed on the manufacturing processes normally associated with the preparation for export or local use of the Colony's mineral, agricultural, and forest products. These comprise 10 sugar factories, 7 main and 6 small petroleum refinery topping plants, 2 cracking plants, 2 Edeleanu plants, 4 petroleum gas absorption plants, an asphalt drying plant, 5 rum distilleries, 13 saw-mills, and numerous establishments connected with copra and cocoa drying, factories for the manufacture of edible oil, lard substitute, and laundry soap, lime-juice, calcium citrate, and a citrus packing shed.

(b) Establishments employed in the manufacture of articles for local use, and those of a public utility nature, e.g., 1 foundry, 5 tanneries, 2 power stations, 1 cigarette factory, 1 brewery, 3 biscuit factories, 2 large aerated water factories and several minor ones, 3 ice factories, and match, chocolate, liquid carbon dioxide, and salt refining factories.

(c) The Angostura bitters factory, which manufactures large quantities of bitters almost entirely for export; there has been a serious decline in exports in recent years, the amount exported in 1929 being valued at £87,609, as compared with £21,115 in 1933.

There are small exports of biscuits, matches, shoes, and other locally-manufactured articles to the West Indian Islands, Venezuela, and other neighbouring countries.

VII.—Other Economic Activities.

Entrepôt Trade.—There is an important re-export and transshipment trade, Port-of-Spain being an important port of call for numerous steamship services and acting as an entrepôt and collecting and distributing centre for the smaller West Indian Islands, the Guianas, and Venezuela.

Re-exports amounted in 1933 to £274,007 (out of total exports of £4,598,000): and goods entered for transshipment amounted to £808 (not included in the export figures). Included in the re-exports were goods to the value of £59,000 classified as ships' stores and bunkers.

Tourist Traffic.—During the winter months Trinidad is visited by a large number of tourist ships. To meet the needs of tourists a Tourist Inquiry Bureau was opened in the Customs Buildings during the latter part of 1932 and this organization has done much in the way of assisting and giving valuable information to visitors.

VIII.—Communications.

Internal Communications.—Good roads radiate throughout the Colony and most centres of population can be reached by motor car. The roads are divided into main and local roads, the former and about half the latter being maintained by the Colonial Government and the remainder by Local Road Boards.

There are 1,079 miles of main roads made up as follows:—

	Miles.
Metalled or gravelled and oiled	278
Pitched	31
Metalled	361
Gravelled	220
Natural soil	189
Total	1,079

There are 762 miles of local roads made up as follows:—

	Miles.
Metalled or gravelled and oiled	12
Pitched	28
Metalled	83
Gravelled	253
Natural soil	386
Total	762

There are also 633 miles of local roads maintained by Local Road Boards made up as follows:—

	Miles.
Metalled and oiled	75
Metalled	37
Gravelled	116
Pitched	68
Natural soil	237
Total	633

Motor omnibuses ply on the main roads and are much used by the general public and there are ample facilities for the hire of motor cars for private use.

The Trinidad Electric Company, Limited, operates a tramway system (15 miles long) in Port-of-Spain.

The Trinidad Government Railway (4 feet 8½ inches gauge) provides communication between Port-of-Spain and most of the principal other towns. The total length of the system is 123 miles (of which 6½ miles between Port-of-Spain and St. Joseph is double track). Five miles of the line have been leased to other interests.

The railway affords communication for passengers over all lines three times a day or oftener and there is an ample service of goods trains.

Road transport feeder services between the principal terminal stations and the coast provide for through transport between all the districts of the Colony.

In connexion with the railway a steamer makes three trips a week each way between Port-of-Spain and the Bocas entrance to the Gulf, including the islands to the west of Port-of-Spain.

Communication between Trinidad and Tobago is maintained by two Government steamers, the s.s. *Trinidad* which gives a fortnightly coasting service to north Trinidad and Tobago towns and villages, and the s.s. *Tobago* which completes five trips every two weeks between Port-of-Spain, Trinidad, and Scarborough, Tobago.

External Communications.—There are ample facilities for steamship communication with the outer world, Port-of-Spain being a port of call on a number of services to Central and South America.

Communication with the United Kingdom is maintained by the Elders and Fyffes, Harrison, and Leyland Lines and with other European ports by the Royal Netherlands West India Mail, the Compagnie Générale Transatlantique, Horn and Hamburg Amerika Lines, some of which also call at United Kingdom ports.

Fortnightly passenger communication with eastern Canadian ports is maintained by the Canadian National steamers. Cargo services are provided by this line and the Ocean Dominion Steamship Corporation and monthly communication with western Canadian ports is provided by the Vancouver West Indies Line.

Communication with the other West Indian Islands of the Lesser Antilles is maintained by a number of services, the usual service used by passengers being that of the Canadian National steamships.

The Nourse Line gives a monthly cargo service with India with occasional opportunities for passengers.

There are frequent opportunities of communication by various foreign lines with the ports of both the east and west coasts of the United States and Central and South America.

Pan-American Airways maintain regular air-mail services with the United States (Miami) via St. Lucia, Antigua, St. Thomas (Virgin Islands), Porto Rico, Dominican Republic, Haiti, and Cuba, and with Buenos Aires via Georgetown (British Guiana) and a number of South American ports; also with Cristobal (Isthmus of Panama) via Venezuela and Colombian ports, with Jamaica (via Barranquilla), and with Central America and the west coast of South America.

The ports of entry of the Colony are Port-of-Spain, San Fernando, Brighton, and Scarborough (Tobago), but entries at ports other than Port-of-Spain are inconsiderable, the figures for 1933 being:—San Fernando 2 sailing vessels and 68 steamers, Brighton 23 sailing vessels and 50 steamers, and Scarborough 2 sailing vessels and one steamer. The steamers entering at San Fernando and Brighton are tankers, which take cargoes from the oil-loading jetties in those ports.

The total number of vessels entered at all ports of the Colony in 1933 was as follows:—

Country of registration.	Sailing vessels.		Steamers.	
	No.	Net tons.	No.	Net tons.
British	471	16,809	546	2,056,862
Venezuela	432	10,175	217	38,244
Norway	—	—	220	439,559
United States of America ...	3	312	125	508,880
Germany	—	—	127	418,201
Holland	44	3,164	97	342,683
Other	5	382	127	553,640
	955	30,842	1,459	4,357,969

Port-of-Spain harbour is an open bay and all big vessels lie off and discharge their cargo into lighters. A channel 250 feet and with a minimum depth of 15 feet L.W.O.S.T. is kept dredged from deep water to the St. Vincent Jetty (390 feet long with a depth of 15 feet alongside). Other jetties and wharves have the following frontage:—9 feet deep, 1,160 feet, 7 feet deep, 1,100 feet, 6 feet deep 550 feet. There are no dry or floating docks. Plans are now in preparation for providing Port-of-Spain with a deep water harbour.

San Fernando harbour is an open bay with a shallow water jetty and wharf giving 2,250 feet frontage with a depth of 3 to 3½ feet.

Pointe-à-Pierre oil-loading jetty, within the port limits of San Fernando, is 315 feet long and is connected to the shore by a viaduct 1,500 yards long. It has a depth of 31 feet alongside.

Brighton is an open bay with a pier 717 yards long providing two berths, each 400 feet long, on each side of the seaward end of the pier; two of these berths have a depth of 30 feet and two a depth of 23 feet.

La Brea, within the port limits of Brighton, has a small oil-loading jetty, 50 feet by 30 feet connected with the shore by a viaduct 583 yards long. The depth alongside is 30 feet.

IX.—Tariff.

Import duties are levied on all imports except those specifically exempted. Specific duties are charged on about half the dutiable goods (including all those liable to high duties) and *ad valorem* duties (up to 15 per cent. preferential and 30 per cent. general) on the rest. Goods not exempted or specifically charged are liable to *ad valorem* duties of 10 per cent. preferential and 20 per cent. general. A surtax of 10 per cent. of the duty is levied on all dutiable goods, with a few exceptions.

Preferential rates of duty are charged on goods of Empire origin. Generally the margin of preference is one-half the rate applicable to foreign goods, but higher margins are provided in a number of cases and lower ones in the case of the revenue duties on alcoholic liquor and tobacco.

Tariff concessions to public bodies, churches, etc., formerly granted for all goods, are now limited to goods of Empire origin.

X.—Trade Representatives.

Trinidad interests are represented in the United Kingdom by the West India Committee (14, Trinity Square, London, E.C.3) and in Canada by the Trade Commissioner for the Eastern Group of the British West Indies (225, Board of Trade Building, Montreal, Canada).

GRENADA.

I.—Situation, etc.

The Colony of Grenada, the smallest but the most densely populated of the three Windward Island Colonies, comprises the island of Grenada, situated in latitude 12° N. and longitude 61° W., with an area of 76,548 acres (119·6 square miles), and the island of Carriacou, lying somewhat to the north, with an area of 8,467 acres (13·2 square miles), making a total area of 85,015 acres or 132·8 square miles.

Grenada is mountainous and well watered with streams and has a rugged coast line.

The climate from December to the end of April, when the heat is tempered by the prevailing trade winds, may be described as good. From July to the end of October there is greater humidity and higher temperature with little variation and the climate, though not really unhealthy, is debilitating to Europeans.

There is little variation of temperature from month to month. In 1933 at Richmond Hill, the meteorological station 507 feet above sea level, the highest temperature recorded was 90° F. and the lowest 70° F., both occurring on several days. The mean of maximum temperatures was 89° F. and that of minimum 71° F.

The rainfall varies according to the altitude. In the lowland of the south the annual amount is as low as 30 inches; in the mountainous centres it approaches 140 inches. At St. George's, the capital of the Colony, midway between the two, the rainfall in 1933 was 95.68 inches and the average over the past 30 years has been 74 inches.

Most of the land is in private possession and Crown Land is small in area and consists principally of mountain ridges kept under forest for climatic reasons. A remarkable feature is the number of small-holdings in Grenada, due principally to the general abandonment of sugar cultivation about 100 years ago and various Land Settlement Schemes under which large properties were acquired by the Government and resold to peasants in small lots. Further schemes of this nature are in actual operation.

The following table shows the number of holdings in the Colony :—

10 acres and under	...	...	...	...	...	16,669
11 to 50 acres	...	...	...	...	...	334
51 to 100 acres	...	...	...	...	...	53
101 to 1,000 acres	...	...	...	...	...	138
Over 1,000 acres	...	...	...	...	...	1
						17,195

II.—Population, etc.

The aboriginal inhabitants of the Colony were Caribs, but that race is now extinct. The native population is composed mainly of negroes of African descent.

According to the census of 1921 (the latest available as there was no census in 1931) the population was composed as follows:—

Negroes	...	...	...	...	...	51,032
Coloured	...	...	...	...	...	11,673
Oriental	...	...	...	...	...	2,692
Europeans	...	...	...	...	...	905
						66,302

By 1933 it was estimated that the population had increased to 82,624, of whom 73,719 resided in Grenada and 8,905 in Carriacou. The population is increasing steadily, births exceeding deaths by a substantial margin.

Immigration and emigration are of no importance to the economic life of the Colony.

Almost the whole adult population of the country is engaged in agriculture.

III.—Finance.

A. CURRENCY AND BANKING.

1. The coinage current in the Colony is United Kingdom gold, silver, and bronze coinage. Silver coin is legal tender for any amount.

Bank-notes of a denomination of \$5, issued by Barclay's Bank (Dominion, Colonial and Overseas) and the Royal Bank of Canada, are in use although they are not legal tender.

No returns of the amount of coin and bank-notes in circulation are available.

The local coin of account is the "dollar" (\$ = 4s. 2d., 1 cent. = $\frac{1}{4}$ d.).

2. Barclay's Bank (Dominion, Colonial, and Overseas) and the Royal Bank of Canada both maintain branches at St. George's and agencies at Grenville.

There is one Co-operative Bank in the Colony, the Grenada Co-operative Bank, Limited, incorporated in 1932, with a registered capital of \$150,000. On the 30th September, 1934, the subscribed capital amounted to \$5,205 and Savings Bank deposits to \$17,275.

3. The Government maintains a Savings Bank with 6 branches in Grenada and 1 in Carriacou. The number of depositors on the 31st of December, 1933, was 3,942 and the total amount deposited was £51,628.

B. PUBLIC FINANCE.

1. Public Debt.

The total amount of the Public Debt of the Colony on the 31st of August, 1934, was £174,761.

Of this amount £27,364 has been advanced by the Colonial Development Fund and £3,443 by the National Debt Commissioners of the United Kingdom.

£40,712 was borrowed for the electric lighting of the town of St. George's and reconstruction of the telephone system; £6,905 for the erection of a covered market by the St. Andrew's District Board; £3,599 for water supply extension in St. Andrew's; and £29,308 for the reconstruction of the western main road.

Sinking funds have been accumulated to an amount of £5,048 by the 31st of August, 1934.

2. (A) *Analysis of Revenue (on the basis of the Estimates for the year ending 31st December, 1934).**Self-balancing Departments.*

	Revenue.	Expenditure.	Surplus (+) or Deficit (-).
	£	£	£
Post Office	3,390	3,429	— 39
Harbour	2,800	698	+1,902
Telephones, Electric Light, Power and Refrigeration.	8,263	8,574	— 311
Water Supplies	4,076	4,530	— 454
	<u>18,329</u>	<u>17,231</u>	<u>+1,098</u>

Net surplus, £1,098.

General Revenue.

1. Customs :—	£	£	Percentage.
Import Duties	57,460		
Export Duties	3,500		
Warehouse Rents	200		
		61,160	57·2
2. Licences, Excise, and Internal Revenue not otherwise classified		27,263	25·5
3. Estate Duties		1,000	0·9
4. Income-tax		5,000	4·6
5. Fees of Office, etc.		4,821	4·5
6. Revenue from Government Property		1,065	1·0
7. Interest		5,207	4·8
8. Miscellaneous		165	0·3
9. Land Sales		180	0·3
10. Surplus on self-balancing Departments		1,098	0·9
		<u>106,959</u>	<u>100</u>
Revenue of self-balancing Departments set off against Expenditure		17,231	—
Total		<u>124,190</u>	<u>—</u>

2. (B) *Analysis of Import Duties for 1933.**Amount of Duty Collected on Articles imported from:—*

Class.	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
I	14,931	17,140	4,671	36,742
II	10	174	219	403
III	7,208	7,908	4,498	19,614
IV	3	2	—	5
	<u>22,152</u>	<u>25,224</u>	<u>9,388</u>	<u>56,764</u>
Parcel Post	—	—	—	1,520
Total				<u>58,284</u>

3. *Analysis of Expenditure (on the basis of the Estimates for the year ending 31st December, 1934).*

	£	Percentage.
1. Debt Charges	12,487	11·0
2. Administration	41,945	37·2
3. Economic Development	5,671	5·0
4. Social Services :—	£	
Medical	20,132	
Educational	14,277	
Others	9,152	
	<u>43,561</u>	<u>38·6</u>
5. Defence	127	0·3
6. Non-effective, i.e., Pensions	9,130	7·9
	<u>112,921</u>	<u>100</u>
Expenditure of self-balancing Departments set off against Revenue	17,231	—
Total	<u>130,152</u>	<u>—</u>

4. As at the 31st December, 1933, the Colony's Reserve Fund amounted to £50,000, in addition to which there were surplus assets amounting to approximately £39,748.

5. The Colony has received the following grants and loans from the Colonial Development Fund:—

<i>Scheme.</i>	<i>Loan.</i>	<i>Grant.</i>
	£	£
Reconstruction of Main Roads	29,624*	8,000
Engineering Expert	—	91
Anti-Malarial Drainage... ..	17,051	15,000
Medical Visiting Stations		
Incinerator and Disinfectors		
Hospital Improvements		
Water Supply		
Dental Clinic	—	3,000
Water Tanks in Carriacou and Petit Martinique	—	200
Medical Visiting Station in Petit Martinique	—	100
Landing Stage, Petit Martinique	—	660
Cold Storage Plant	5,941	—
Agricultural Improvements in Carriacou	—	(General Allocation).
Marketing Officer, Leeward and Windward Islands	15,000	—
Land Settlements	3,243	—
Electric Light Plant, St. George's	—	—

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
	£	£	£	£
1913	228,232	6,496	132,421	367,149
1930	164,706	81,688	110,366	356,760
1931	162,729	40,731	77,800	281,260
1932	90,545	53,768	54,617	198,930
1933	85,287	75,209	37,573	198,069

(ii) *Domestic Exports by Classes, 1933.*

<i>To:—</i>	<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
	£	£	£	£	£
United Kingdom	72,476	7,338	5,280	—	85,094
Canada	56,284	—	—	—	56,284
Rest of Empire	5,556	1,976	48	81	7,661
<i>Total Empire</i>	134,316	9,314	5,328	81	149,039
United States of America	34,845	—	1,333	—	36,178
Other foreign countries	462	329	—	—	791
<i>Total foreign countries</i>	35,307	329	1,333	—	36,969
GRAND TOTAL	169,623	9,643	6,661	81	186,008

(iii) *Principal Domestic Exports, 1933.*

<i>Article.</i>	<i>Quantity.</i>	<i>Total Value.</i>	<i>Principal Countries of destination with amounts in £'000.</i>
		£	
<i>Class I.</i>			
Cocoa, raw	4,567 tons	106,535	Canada (52), United Kingdom (43).
Spices—			
Nutmegs	28,287 cwt.	37,024	United States of America (23), United Kingdom (10).
Mace	4,416 „	22,476	United Kingdom (19).
Other	170 „	268	
	32,873 „	59,768	
<i>Class II.</i>			
Cotton, raw	3,174 cwt.	4,183	United Kingdom (4).
Copra	305 tons	3,058	United Kingdom (3).
Cotton Seed	8,114 cwt.	1,781	Barbados (all).
<i>Class III.</i>			
Lime Oil	477 gal.	6,613	United Kingdom (5).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>
	£	£	£	£
1913	113,076	69,135	100,716	282,927
1930	117,716	144,917	85,918	348,551
1931	106,933	107,121	55,564	269,618
1932	115,762	98,706	45,275	259,743
1933	105,442	85,027	40,072	230,541

* Raised by Crown Agents.

(ii) Imports by Classes, 1933.

	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
From :—	£	£	£	£	£
United Kingdom	25,720	73	73,125	6,524	105,442
Canada	30,261	4,140	4,854	533	39,788
Trinidad	1,295	101	13,286	407	15,089
Barbados	8,005	9	401	207	8,622
British Guiana	6,441	238	483	29	7,191
Newfoundland	6,422	—	—	—	6,422
Rest of Empire	1,963	55	5,768	118	7,904
Total Empire	80,107	4,616	97,917	7,818	190,458
United States of America...	3,573	4,710	10,811	1,177	20,271
Other foreign countries ...	6,652	467	12,116	577	19,812
Total foreign countries ...	10,225	5,177	22,927	1,754	40,083
GRAND TOTAL	90,332	9,793	120,844	9,572	230,541

(iii) Principal Imports, 1933.

Article.	Quantity.	Total Value. £	Principal Countries of origin with amounts in £'000.
Class I.			
Grain, flour, pulse, etc.—			
Flour, wheaten	47,359 cwt.	25,006	Canada (23).
Other	18,933 cwt.	8,901	British Guiana (6).
	66,292 cwt.	33,907	
Fish (all kinds)	8,675 cwt.	9,858	Newfoundland (6).
Sugar	848 tons	9,144	Barbados (6).
Butter and substitutes ...	1,571 cwt.	6,106	United Kingdom (2), Holland (2).
Tobacco (all kinds)	48,335 lb.	5,394	United Kingdom (4).
Meats (all kinds)	1,246 cwt.	3,436	United Kingdom (2), United States of America (1).
Class II.			
Wood and Timber, unmanufactured—			
Lumber	745,782 cub. feet	8,701	United States of America (4), Canada (4).
Shingles, Shooks, etc. ...	—	897	
		9,598	
Class III.			
Cotton Manufactures—			
Piece-goods	1,091,383 yd.	18,425	United Kingdom (14), United States of America (3).
Other	—	3,399	United Kingdom (3).
		21,824	
Oils—			
Motor Spirit	115,329 gal.	5,917	Trinidad (all).
Illuminating	95,368 gal.	4,731	Trinidad (4).
Other	38,193 gal.	2,631	Trinidad (1).
	298,890 gal.	13,279	
Motor cars and parts... ..	—	9,745	United Kingdom (5).
Boots and Shoes	5,082 doz. pr.	7,025	United Kingdom (4).
Soap (all kinds)	3,691 cwt.	5,185	United Kingdom (4).
Iron and Steel Manufactures	—	4,056	United Kingdom (3).
Bags and Sacks	10,844 doz.	3,992	India (3).
Hardware	—	3,567	United Kingdom (2).
Apparel	—	3,285	United Kingdom (2), Japan (1).

V.—Natural resources.

A.

1. AGRICULTURE.

The resources of the Colony are almost entirely agricultural.

The most important crop is *cocoa* which accounts for a little over 50 per cent. by value of all exports. The variety grown is mainly *Forastero*, with some *Calabacillo*. The crop year is usually reckoned as beginning on the 1st of October.

Exports during recent years have been as follows:—

	Quantity in cwt.	Value in £		Quantity in cwt.	Value in £
1929	90,987	210,082	1932	87,836	101,231
1930	84,863	192,543	1933	91,339	106,535
1931	87,656	153,923			

As the figures indicate there has been a severe fall in values in recent years, but the cocoa is of good quality and commands a substantially higher price than West African. The cocoa is generally well prepared, but there is room for improvement in the peasant-grown produce.

The cocoa is usually sent principally to the United Kingdom but in 1933 Canada took the lead, countries of destination in that year having been as follows:—

	Quantity in cwt.	Value in £
Canada	46,917	52,364
United Kingdom	33,866	42,868
United States of America	8,991	9,405
European countries	708	825
Other countries	857	1,073
	<u>91,339</u>	<u>106,535</u>

The production in the crop year 1933-34 was somewhat above that in the preceding year, shipments being 50,118 bags during the crop year as against 47,616 bags.

The next products in order of importance are **nutmegs** and **mace** which is a derivative of the nutmeg being the lace-like covering of the kernel.

The quality of Grenada nutmegs is not as high as that of those produced in the East, and the whole subject was recently investigated by the Empire Marketing Board. It is possible that special grades might be produced in new plantings, but in general little can be done to improve the output of existing plantations except to give additional care to grading before export.

Exports during recent years have been as follows:—

			<i>Nutmegs.</i>		<i>Mace.</i>	
			Quantity in cwt.	Value in £	Quantity in cwt.	Value in £
1929	22,666	100,323	3,765	55,766		
1930	19,972	67,794	3,567	41,395		
1931	26,195	54,808	3,658	28,864		
1932	27,305	36,859	4,181	23,090		
1933	23,287	37,024	4,416	22,476		

As the figures indicate there has been a severe fall in values in recent years. These products are sent principally to the United Kingdom and the United States of America, the countries of destination in 1933 having been as follows:—

			<i>Nutmegs.</i>		<i>Mace.</i>	
			cwt.	£	cwt.	£
United Kingdom	7,933	10,098	3,645	19,018		
Canada	2,056	2,915	189	809		
Other British countries	767	990	9	50		
United States of America	17,451	22,910	533	2,367		
Other foreign countries	80	111	40	232		
	<u>28,287</u>	<u>37,024</u>	<u>4,416</u>	<u>22,476</u>		

Cotton is not grown in Grenada, but is of importance to Carriacou. The type grown is Marie Galante, similar to American Middling Upland and commanding a similar price on the Liverpool market. An improved type is being propagated, and from samples reported upon the price would be about 9½d. to 10d. per lb. with American Middling Upland at about 6-86d. per lb.

Exports of cotton during recent years have been as follows:—

			Quantity in cwt.	Value in £				Quantity in cwt.	Value in £
1929	2,945	14,905	1932	3,119	6,776				
1930	3,256	15,395	1933	3,174	4,183				
1931	2,369	6,272							

The whole crop is usually sent to the United Kingdom.

A certain amount of cotton seed is exported, as the following figures show:—

			Quantity in cwt.	Value in £				Quantity in cwt.	Value in £
1929	6,804	4,119	1932	7,491	1,531				
1930	7,043	4,286	1933	8,114	1,781				
1931	5,428	2,000							

The whole of the 1933 crop was sent to Barbados, where it is crushed.

The cultivation of *citrus* fruit is of some importance in the Colony. The export of grape-fruit and oranges is comparatively small and though a good number of budded plants have been set out, it will still be some time before exports assume appreciable proportions. There is some export of green limes to Canada.

Lime oil is exported in substantial quantities, the figures for the past five years being:—

Year.	Gallons.	£	Year.	Gallons.	£
1929	903	10,976	1932	753	10,720
1930	560	6,971	1933	447	6,613
1931	713	9,269			

Almost all these exports normally go to the United Kingdom.

Other agricultural products are of relatively little importance.

The *coconut palm* is one of the older staples and there are trifling exports of fresh nuts and more substantial exports of copra, the quantity for 1933 being 305 tons valued at £3,058.

Attempts have been made to develop the cultivation of tomatoes and other vegetables but it is doubtful whether conditions in Grenada are suitable.

The canning of tropical fruits has been discontinued. Fresh fruits, however, such as mangoes, are being forwarded for sale to Montreal and Covent Garden. The cold storage plant continues to function satisfactorily.

There is a local *sugar* industry but the Colony is not self-supporting in sugar and imports in 1933 amounted to some 848 tons.

In the case of *rum*, however, which is manufactured at 13 sugar estates, the Colony is just self-supporting. The quantity manufactured in 1933 was 36,649 proof gallons.

It must be remembered in considering development generally in Grenada that the remaining fertile land not already under profitable cultivation is limited and development of new cultivation to any great extent could be achieved only at the expense of some of the existing permanent crops.

The prospects of building up a valuable export trade in *bananas* (the Gros Michel variety) are hopeful. Since April, 1934, regular fortnightly shipments have been sent to Canada, which will, it is hoped, be the principal market, and with the extensive field planting which has been already undertaken rapid and progressive development is anticipated. It is contemplated that ultimately some 15,000 acres will be put under bananas and it is hoped that by the end of 1935 shipments will be made at the rate of one million bunches annually. Direct contracts have been made between the growers and the Canadian Fruit Company, Limited, and arrangements for shipping have been made with Canadian National Steamships.

There is substantial production of ground-provisions and other foodstuffs for local consumption but no statistics are available of these products.

2. FORESTRY.

Some 6,000 acres are under natural forest, the greater part of which is reserved in order to safeguard the water supply of the Colony.

Exports of forest products are trivial, comprising only a little cedar (value in 1932, £2) and logwood (value in 1932, £71).

3. ANIMAL HUSBANDRY.

The Colony is almost self-supporting in meat, imports being comparatively inconsiderable, and has an established dairying industry.

There is a small export trade in live animals for slaughter (cattle, sheep, goats, pigs, and poultry) to Trinidad and this should be capable of expansion.

Certain pure-bred stock and poultry have been introduced by private enterprise from the United Kingdom and the Government has for some years maintained some pure-bred Friesian bulls of the Canadian strain in order to improve the native cattle for dairy purposes, and for crossing with the Indian (Zebu) cattle for both draught and milk production.

No particulars can be given of the number of animals on the Island. The value of the production of the dairying industry cannot be estimated with any accuracy.

4. MINERALS.

So far as is known the Colony contains no mineral wealth.

5. FISHERIES.

A large number of canoes and small boats are employed in fishing on the coasts of the Colony and, although there is no established fishing industry, supplies of good fresh fish are constant, as there are several good fishing grounds near the coast.

No statistics of quantities caught or persons employed are available.

B.

FOOD SUPPLIES.

So far as most foodstuffs are concerned the Colony is, or could be, self-sufficing, but certain foodstuffs could not in any circumstances be produced in the Colony, and the annual value of imported foodstuffs is comparatively high, the figure for 1933 being about £73,000.

The principal items which are, and must necessarily be, imported are the following:—

Article.						Value of imports in 1933.	Principal countries of origin with values.
						£	
Wheat flour	...	...	...	...	...	25,006	Canada £22,616
Sugar	...	...	...	...	...	9,144	Barbados £6,125
							United Kingdom £2,419
Fish (all kinds)	...	...	...	...	...	9,858	Newfoundland £6,422
							Canada £3,086
Rice	...	...	...	...	...	6,424	British Guiana £6,372

No other individual item amounted to as much as £4,000 in 1933.

VI.—Industry.

There is no established industry in the Colony, and the only industrial establishment not occupied in preparing local products for export is an ice factory.

The remaining establishments are 12 distilleries, 8 lime-juice and lime-oil factories, and 110 sugar mills, 50 operated with cattle, 43 with kerosene oil, 13 with water power, and 4 with steam power.

No statistics of the persons employed in these establishments are available, but regular employment is unlikely except to small numbers.

VII.—Other Economic Activities.

Neither entrepôt trade nor the tourist traffic are of any importance in the economic life of the Colony.

VIII.—Communications.

The Colony is well provided with a good system of roads kept in sound repair by seven motor rollers. There are 115 miles of main roads in Grenada and 33 in Carriacou.

There are also 87 miles of first class by-ways and 218 miles of second class by-ways in the two islands. Of these 274 miles are in Grenada and 31 in Carriacou.

383 miles of road are maintained by the Public Works Department, of which 56 are treated with oil or emulsion, 267 miles are metalled and 60 miles are earth roads.

Sea communication between Grenada and Carriacou and between the Colony and Trinidad, Barbados, and other neighbouring islands is maintained by numerous sailing vessels.

There is a regular direct monthly service to London by passenger steamers of the Harrison Line, while frequent calls are made by cargo steamers of this Company, especially during the crop season from December to May.

A fortnightly mail, passenger, and cargo service with Canada is maintained by the Canadian National Steamships Company.

The cargo steamers of the Ocean Dominion Line maintain a fortnightly service with Canadian ports.

Steamers of the Furness Withy Line supply a direct passenger and cargo service with New York calling at intervals of about fourteen days. The voyage occupies seven days.

The only port of entry for steam vessels is St. George's. Sailing vessels also enter at Grenville and Hillsborough, Carriacou.

The total number of sailing vessels entered in 1933 was 267 (3 Dutch, and the remainder British) of a total net tonnage of 9,006 tons.

The total number of steam vessels entered in 1933 was 228 of a total net tonnage of 768,530 tons made up as follows:—

	Number.	Tons.
British	162	647,224
Norwegian	32	43,494
United States	19	29,448
Other	15	48,384
	240	768,530

St. George's is a land-locked deep-watered harbour. The minimum width of the entrance is 500 feet giving a depth varying from 30 to 72 feet and there is a buoyed channel of 30 feet minimum depth.

No wharves capable of berthing ocean-going steamers exist, the depth of the wharf frontage varying from 4 to 12 feet only. There are no public piers, but there is a privately-owned timber pier with a frontage of 200 feet and a depth of from 15 to 21 feet.

IX.—Tariff.

Import duties are levied on all goods imported into the Colony with the exception of a number appearing on a special list of exemptions. Generally the rates of duty are specific in the case of foodstuffs, drink, and tobacco, and *ad valorem* in the case of manufactured articles but this rule is not invariable. The *ad valorem* rates vary from 2½ per cent. to 20 per cent. on Empire goods and from 5 per cent. to 35 per cent. on foreign goods, the most usual rates being 15 per cent. and 22½ per cent. respectively, being the rates applicable to goods not exempted or specially charged.

Preference is granted to goods of Empire origin in the case of all dutiable goods, at the rate of not less than 33½ per cent. of the appropriate general rate of duty (except in the case of spirits on which there is a preference of 2s. 6d. per proof gallon). On a number of articles (e.g., motor cars, cotton, and silk hosiery) a higher proportion of preference is given, and on some foreign goods duties are levied while similar Empire goods are admitted free.

X.—Trade Representatives.

There are no official representatives of the Colony overseas except the West Indian Trade Commissioner maintained jointly by various West Indian Governments in Canada.

The Colony's interests are represented unofficially in the United Kingdom by the West India Committee.

ST. LUCIA.

I.—Situation, etc.

The Colony of St. Lucia is the largest of the Windward Islands, but its population is less than that of Grenada.

The island is situated in latitude 13° and 14° North and longitude 60° and 61° West at a distance of 24 miles to the south-east of Martinique and 21 miles to the north-east of St. Vincent.

It is 27 miles long and 14 miles broad and has an area of 152,320 acres (238 square miles).

The climate of the island is healthy and compares favourably with that of the other West Indies. The "hot season" extends from May to November and the "cool season" from December to May, but there is no very marked difference between the temperature during the two seasons. At Castries, the capital of the Colony, the highest monthly maximum in 1933 was 92° F., in the months of July, August, and September, while the lowest monthly maximum was 87° F. in January and March. The highest monthly minimum was 72° F. in May, while the lowest monthly minimum was 63° F. in February. It will be observed that the diurnal range is substantial. In the elevated parts of the island lower temperatures are generally recorded.

There is a "wet season" from June to November, approximately the same as the "hot season", and a "dry season" covering the rest of the year. The average rainfall at Castries over the last 44 years has been 91.47 inches. In 1932, a definitely wet year, the rainfall was 103.17 inches, of which 72.45 inches fell in the "wet season" (3.27 inches on the 18th November) and 30.72 inches in the "dry season"; in 1933 it was 121.83 inches, of which 90.58 inches fell in the wet season, and 31.25 inches in the dry season, a maximum of 4 inches falling on 11th April.

Of the total area of the Colony, 152,320 acres, 138,721 acres are now in private possession. Of the rest, 13,154 acres are still Crown Lands and 445 acres were in process of alienation during 1933. The alienation of Crown Lands and the prices to be paid therefor are governed by statutory regulations.

No information appears to be available regarding the size of private holdings of land.

II.—Population, etc.

The aboriginal population of the island was Carib, but this race is now entirely extinct. The present population consists almost entirely of Europeans and the descendants of immigrants and slaves of European and African origin, but no statistics of the racial constituents of the present population appear to be available.

The population of the island on the 31st of December, 1933, was computed to be 62,000. The population is steadily increasing.

Immigration and emigration are of no importance in the economic life of the Colony, although there is a certain small inward and outward movement.

The population are engaged almost entirely in agricultural pursuits, except for a section of the population of Castries who are dependent on the coaling trade for employment and are suffering severely from unemployment in the present depression.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The gold, silver, and bronze coinage of the United Kingdom are legal tender for any amount in the Colony. It is estimated that about £12,000 worth of silver coin are in circulation.

The gold coins of the United States of America are legal tender but are not in actual circulation.

The local coin of account is the dollar (\$1 = 4s. 2d.; 1 cent = $\frac{1}{4}$ d.).

Bank notes have been issued locally in "dollar" denominations by Barclay's Bank (Dominion, Colonial, and Overseas), the amount in circulation on 31st December, 1933, being estimated at \$93,525. These issues are covered by deposits with the Crown Agents to the full value of the issue.

2. Barclay's Bank (Dominion, Colonial, and Overseas) maintain a branch in the Colony, and conduct all classes of business, including Savings Bank business.

3. There is a Government Savings Bank, the number of Depositors on the 31st of December, 1933, being 795 and the total amount deposited £16,696.

The Government does not engage in any other form of banking business.

B.—PUBLIC FINANCE.

1. *Public Debt.*

There are at present eleven different loans outstanding against the Colony, amounting in all to £123,430. Against this there are accumulated sinking funds, the total securities to the credit of which on the 31st of December, 1933, were valued at £6,822.

Of the amount outstanding £3,889 is due to the Imperial Government and £16,084 to the Colonial Development Fund. The remaining loans have been raised by public subscription on the London market and locally.

A substantial part of the sums so raised has been lent to the Castries Town Board and other local authorities and £5,000 to private individuals (for the reconstruction of houses burnt in the fire of May, 1927) and the Colonial Government is responsible only in the event of default by those parties.

2.—(a) *Analysis of Revenue (on the basis of the Estimates for 1934).*
Self-Balancing Departments.

	Revenue.	Expenditure.
	£	£
Port and Marine Department ...	3,002	1,240
Post Office	1,630	926
Telephones	1,403	870
	<u>£6,035</u>	<u>£3,036</u>
Net Surplus ...	£2,999.	
<i>General Revenue.</i>		
	£	Percentage.
1. Customs—		
Import Duties	39,500	
Export Duties	2,000	
	<u>41,500</u>	58·3
2. Licences, Excise and other Internal Revenue ...	19,955	28·1
3. Fees of Court, etc.	4,158	5·8
4. Rent, Interest and Miscellaneous Revenue ...	2,529	3·6
5. Surplus on self-balancing Departments ...	2,999	4·2
	<u>71,141</u>	<u>100·0</u>
Revenue of self-balancing Departments set-off against Expenditure	3,036	
Total	<u>£74,177</u>	

2.—(b) *Analysis of Import duties for 1933.*
Amount of duty collected on articles imported from:—

	United. Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
Class I	8,935	9,065	3,692	21,692
Class II	465	26	150	641
Class III	6,761	3,802	4,401	14,964
Class IV	—	1	1	2
Parcels Post	—	—	—	1,203
Total	<u>£16,161</u>	<u>£12,894</u>	<u>£8,244</u>	<u>£38,502</u>

3. *Analysis of Expenditure (on the basis of the Estimates for 1934).*

	£	Percentage.
1. Debt Charges	11,090	14·4
2. Administration	26,976	35·1
3. Economic Development	9,691	12·6
4. Social Services	24,120	31·4
5. Defence	359	0·4
6. Non-effective, etc., Pensions	4,600	6·1
Total	<u>76,836</u>	<u>100·0</u>
Expenditure of self-balancing Departments set-off against Revenue	3,036	
Total	<u>£79,872</u>	

4. *Reserve Funds, etc.*

The Colony possesses no reserve or surplus funds.

5. *Grants-in-aid.*

The Colony has been in receipt of grants-in-aid of administration from the Imperial Exchequer since the year 1927-28. The following is a list of the sums received:—

	Estimate.	Expenditure.
	£	£
1927-28 Supplementary Vote	20,000	17,500
1928-29	6,000	5,000
1929-30	3,000	3,000
1930-31 Original Vote £5,000		
Supplementary Vote £2,500	7,500	7,500
1931-32 Original Vote £5,000		
Supplementary Vote £31,500	36,500	36,500
1932-33	8,500	6,500
1933-34	Nil.	—
1934-35	9,000	5,000 (up to 30th Sep- tember, 1934.)

Of the grant made in 1927-28, £5,000 was issued as a loan for relief of distress as a result of of the fire at Castries and is repayable with interest at 2 per cent. per annum by 18 equal annual instalments commencing on 12th December, 1930.

In addition to the above assistance, a sum of £348 13s. 8d. was provided from the Imperial Exchequer in the year 1931-32 for expenditure on road work in relief of unemployment.

Grants and loans have been received from the Colonial Development Fund in respect of the following schemes:—

	£		£
Construction of Roads and Bridges (Grant).	22,000	Citrus Cultivation (Grant) ...	2,000
Water Supplies for villages (Loan) ...	2,680	Cold storage and ice-making plant (Loan)	4,823
Health and Sanitary Services (Grant) ...	10,540	Drainage of Castries (Grant) ...	1,500
Government Fruit Depot... (Grant)	5,300	Marketing Officer (Grant) ...	2,800†
Peasants Development Service }		Electric Light Plant, Castries (Loan) ...	6,500
		Telephone Reconstruction (Loan) ...	2,300

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie, but excluding Ships' Stores) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913 ...	86,025	17,692	27,089	130,806
1930 ...	66,871	40,620	20,170	127,661
1931 ...	25,648	53,796	27,369	106,813
1932 ...	49,203	38,083	19,800	107,086
1933 ...	56,486	25,188	16,804	98,478

Value of Ships' Stores (mainly bunker coal) exported during these years was as follows:—

	£		£		£
1913 ...	143,653	1931 ...	25,111	1933 ...	30,874
1930 ...	44,987	1932 ...	28,410		

(ii) *Domestic Exports by Classes, 1933.*

To:—	Class I.	Class II.	Class III.	Class IV.	Total.
	£	£	£	£	£
United Kingdom ...	50,038	5,243	1,072	—	56,353
Canada ...	7,990	1	1,109	—	9,100
Barbados... ..	3,346	1,913	130	425	5,814
Bermuda	2,808	15	170	—	2,993
Trinidad	1,143	8	206	—	1,357
Rest of Empire ...	55	4	298	1	358
<i>Total Empire ...</i>	<i>65,380</i>	<i>7,184</i>	<i>2,985</i>	<i>426</i>	<i>75,975</i>
United States of America ...	4,927	23	8,297	—	13,247
Other foreign countries... ..	75	3,285	25	—	3,385
<i>Total foreign countries ...</i>	<i>5,002</i>	<i>3,308</i>	<i>8,322</i>	<i>—</i>	<i>16,632</i>
GRAND TOTAL ...	70,382	10,492	11,307	426	92,607

(iii) *Principal Domestic Exports, 1933.*

	Total Quantity.	Total Value. £	Principal countries of destination with amounts in £'000.
<i>Class I.</i>			
Sugar (Vacuum Pan) ...	4,940 tons	46,493	United Kingdom (41), Canada (5).
<i>Fruit—</i>			
Limes, Green ...	3,758 barrels	4,455	United States of America (3), Bermuda (1).
Mixed ...	—	1,999	Barbados (1).
Bananas ...	22,258 bunches	1,626	Canada (1).
Mangoes ...	—	1,212	Bermuda (1).
Other ...	—	849	
		10,141	
Cocoa, raw ...	303 tons	6,778	United Kingdom (5), Trinidad (1).
Coconuts ...	1,199,808	3,527	United Kingdom (1), United States of America (1).
<i>Molasses—</i>			
Fancy ...	30,175 gal.	1,329	Canada (1).
Vacuum pan ...	13,085 gal.	88	
		1,417	
<i>Class II.</i>			
Copra ...	542 tons	5,167	United Kingdom (5).
Charcoal ...	85,840 bags	4,327	Martinique (3), Barbados (1).
<i>Class III.</i>			
<i>Essential Oils—</i>			
Lime (distilled) ...	842 gal.	7,412	United States of America (6).
Lime (handpressed) ...	270 gal.	3,021	United States of America (2).
Bay ...	20 gal.	32	United Kingdom (all).
	1,132 gal.	10,465	

† For Windward and Leeward Islands.

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
			£	£	£	£
1913	...	...	65,269	27,444	192,019	288,405*
1930	...	...	46,077	47,907	92,439	193,252*
1931	...	...	48,874	41,012	46,473	143,349*
1932	...	...	90,011	42,832	26,594	165,269*
1933	...	...	97,185	42,658	22,502	167,010*

(ii) *Imports by Classes, 1933.*

<i>From:—</i>			<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
			£	£	£	£	£
United Kingdom	...	...	16,473	24,118	56,594	—	97,185
Canada	...	...	21,143	719	1,947	2	23,811
Trinidad	...	...	1,131	33	7,328	—	8,492
British Guiana	...	...	2,446	12	300	—	2,758
India	...	...	92	—	2,524	—	2,616
Newfoundland	...	...	2,341	—	—	—	2,341
Rest of Empire	...	...	1,388	106	1,145	1	2,640
<i>Total Empire</i>	...	...	45,014	24,988	69,838	3	139,843
United States of America...	...	...	3	1,852	6,915	—	8,770
Japan	...	...	—	—	3,690	—	3,690
France	...	...	1,954	89	1,308	—	3,351
Holland	...	...	1,129	—	643	—	1,772
Germany	...	...	20	130	1,621	—	1,771
Other foreign countries	...	...	1,757	11	1,378	2	3,148
<i>Total foreign countries</i>	...	...	4,863	2,082	15,555	2	22,502
Parcel Post	...	...	—	—	—	4,665	4,665
GRAND TOTAL	...	...	49,877	27,070	85,393	4,670	167,010

(iii) *Principal Imports, 1933.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of origin with values in £'000.</i>
<i>Class I.</i>		£	
Flour, wheaten	1,375 tons	15,426	Canada (15).
Fish (all kinds)	—	5,891	Canada (3), Newfoundland (2).
Tobacco and snuff	41,751 lb.	5,171	United Kingdom (4), United States of America (1).
Edible Oils	37,703 gal.	5,034	United Kingdom (4).
Butter and butter substitutes	1,051 cwt.	4,020	United Kingdom (2), France (1).
Rice	5,247 cwt.	2,277	British Guiana (2).
Spirits (potable)	2,538 p. gal.	2,073	United Kingdom (2).
Meats (all kinds)	—	1,832	
<i>Class II.</i>			
Coal	22,721 tons	23,955	United Kingdom (all).
Wood and timber unmanufactured (all kinds).	—	2,504	United States of America (2).
<i>Class III.</i>			
Cotton manufactures—			
Piece-goods	564,868 yd.	10,543	United Kingdom (8), Japan (1).
Other kinds	—	8,483	United Kingdom (5), United States of America (3).
Machinery (all kinds)	—	11,387	United Kingdom (11)
Oils—			
Motor Spirit	52,431 gal.	3,290	Trinidad (all).
Illuminating	48,913 „	1,830	Trinidad (1).
Lubricating	5,739 „	969	
Other kinds	70,287 „	1,484	Trinidad (1).
	177,370 „	7,573	
Hardware	—	4,592	United Kingdom (3).
Boots and Shoes	2,214 doz. prs.	3,970	United Kingdom (3).
Soap (all kinds)	2,460 cwt.	3,706	United Kingdom (3).
Bags and Sacks	6,248 doz.	2,753	India (2).
Manures	—	2,595	United Kingdom (2).
Medicines and Drugs...	—	2,578	United Kingdom (2).
Motor Cars and Parts	—	2,329	United Kingdom (1).
Haberdashery and Millinery...	—	1,979	United Kingdom (1).
Electrical Apparatus...	—	1,950	United Kingdom (1).
Cement	536 tons	1,675	United Kingdom (1).
Hats and Bonnets	—	1,574	United Kingdom (1).

* Includes Parcel Post not shown in preceding columns, the value of which was as follows:—

1913	...	...	3,673	1932	...	...	5,832
1930	...	...	6,829	1933	...	...	4,665
1931	...	...	6,990				

V.—Natural Resources.

A.

1. AGRICULTURAL.

The resources of the Colony are almost exclusively agricultural. The chief products are sugar, limes, cocoa and copra, but increased attention is being given to fruits for the export market. The island is only partly developed and there are still considerable areas of good land available for opening up.

From the point of view of value of exports sugar is the most important product. The total area under sugar in 1933 was 4,100 acres; the sugar is produced both on large estates and also by small proprietors on two systems known as the "metayer" and "contributor" systems.

Of the sugar produced in the Colony some 500 tons is retained for the local market and the remainder is exported to the United Kingdom and Canada.

The greater part of the rum produced is also consumed in the Colony.

Exports of sugar products during recent years have been as follows:—

	<i>Sugar (Vacuum Pan).</i>		<i>Molasses and Syrup.</i>		<i>Rum.</i>	
	Tons.	£	Gal.	£	Proof Gal.	£
1929	4,536	51,237	127,273	3,047	2,013	339
1930	4,568	45,289	157,254	2,872	1,583	278
1931	3,973	35,554	24,837	1,194	—	—
1932	4,990	46,466	32,988	1,453	—	—
1933	4,940	46,493	43,260	1,417	—	—

The sugar industry in St. Lucia is not centralized, as the estates are relatively small units, but the factories are moderately well equipped and are being improved each year. Tractor ploughing has been introduced and is proving successful. The depression has been felt very severely and all possible economies are being practised. Tests of new cane varieties are being made and experiments with various fertilizers are in hand.

It is hoped that with the additional preference given in the United Kingdom in 1932 the industry will now be able to survive and take steps to improve its efficiency further.

The second most important export product is limes, the area under this crop being estimated at 1,080 acres. There was a severe outbreak of withertip disease in 1926, and yields were much reduced for some years but by 1931 there was a substantial recovery. Considerable numbers of seedling and budded limes have been planted in recent years. The exports of fresh limes and of lime oil have shown expansion but the industry has been greatly prejudiced by the adoption of the method of producing citric acid from sugar and prices for lime juice in 1931 were so low that a large quantity of the raw juice was thrown away after the oils had been extracted.

The most important product, distilled lime oil, is obtained by distillation of the fruit juices from crushed limes, at the rate of between 3-4 oz. of oil per barrel (160 lb.) of ripe limes. Hand-pressed lime is obtained from unbruised ripe limes by rotating them by hand over copper pans set with points which lightly pierce the fruit rinds and release a highly aromatic essential oil, approximately 2-3 oz. per barrel of limes being recovered by this method.

The following have been the exports of limes and lime products during recent years:—

	<i>Green Limes.</i>		<i>Lime-juice.</i>				<i>Lime Oil.</i>			
	Barrels.	£	<i>Concentrated.</i>		<i>Raw.</i>		<i>Distilled.</i>		<i>Hand-pressed.</i>	
			Gal.	£	Gal.	£	Gal.	£	Gal.	£
1929	1,165	1,758	21,259	5,879	40,675	3,212	685	9,049	329	9,633
1930	2,308	3,218	16,050	2,312	5,140	183	954	10,751	328	7,155
1931	4,114	5,418	10,312	650	6,961	297	1,146	14,524	340	5,236
1932	3,782	5,552	1,880	78	4,069	152	1,149	11,662	221	3,337
1933	3,758	4,455	16,208	860	591	40	843	7,412	270	3,021

The crops during this period calculated in barrels of limes have been as follows:—

	Barrels.		Barrels.		Barrels.
1929	34,483	1931	50,339	1933	44,019
1930	42,844	1932	44,762		

The third export crop in order of importance is cocoa. It grows well in the upland parts of the island, the total area under cocoa in 1933 being about 5,000 acres; in view of the low prices during recent years a reduction of area is to be looked for. Most of the cocoa is estate-grown, and a decreasing amount is grown by smallholders. Peasant-grown cocoa in the island is badly prepared and of very poor quality. The question of improving the quality of the product, more particularly by establishing central fermentaries, has been under consideration, but owing to the reduction of peasants' cocoa, no fermentaries have been established. The preparation of the best estate cocoa has already been improved and market reports show that St. Lucia "planter's cocoa" has gained a fair reputation. The cocoa is rated at about 2s. 4d. per cwt. below the better Trinidad grades.

The large proprietors generally market their crop direct, but the peasants usually sell their crop to the local "factors", who are licensed and registered. About half the total crop finds its way to Trinidad for re-export.

Exports during the recent years have been as follows:—

		<i>Quantity in cwt.</i>	<i>Value in £</i>			<i>Quantity in cwt.</i>	<i>Value in £</i>
1929	...	8,906	18,864	1932	...	8,188	9,091
1930	...	10,449	19,261	1933	...	6,056	6,778
1931	...	10,419	14,125				

Coconuts do well on the flat lands of the island and there is a satisfactory increase in production. The total area under coconuts in 1933 was about 4,850 acres, and as there are a number of plantations which have not yet come into bearing a further increase in the export of coconuts and their products may be anticipated. Although there is still some room for further expansion in this crop, it is possible that there is not much more suitable land, as plantings made on the hill-sides have not been so satisfactory.

No regulations controlling the grading of copra have yet been enacted, and the quality is determined by the amount of hand picking done, and by the use of hot-air driers which to a great extent replace or supplement sun-drying. The best copra is made from ripe nuts containing thick-fleshed kernels such as are common in the valley and sea-side plantations. Such copra is recognized as superior quality and exporters have no difficulty in meeting their brokers' specifications.

Approximately 4,500 nuts are required per ton of copra as against the Trinidad figure reported to be above 6,000 nuts per ton.

Exports in recent years have been as follows:—

<i>Coconuts.</i>				<i>Copra.</i>	
	Number.	£		Tons.	£
1929	295,983	1,032		360	9,878
1930	268,078	862		400	7,428
1931	367,350	1,178		498	5,869
1932	650,240	2,430		432	5,389
1933	1,999,808	3,527		542	5,167

Other Fruits and Vegetables.—St. Lucia is eminently suited for the production of most kinds of tropical fruits, and, as there is a ready and growing market in Canada and also the United Kingdom, the Government gives every encouragement to the peasant as well as to the large proprietor.

The production of oranges, grapefruit, mangoes, and avocado pears has made progress in recent years and steps have been taken to ensure that exports are of a high quality. Legislation to control the grading, packing, and marketing of fruit has been passed, and in 1931 a Government Fruit Packing House was opened and cold storage was provided. Much attention has been given by the Agricultural Superintendent to improved methods of growing mangoes, grapefruit, and avocado pears.

The banana trade to the United Kingdom and to Canada has been seriously taken up, the security of a five-year contract between the Canadian Banana Company and the recently-formed St. Lucia Banana Association, incorporated by Ordinance, having revived interest in this crop. The growers are mainly of the small planter class, and 31 shipments were made during the year 1933 by the three principal buying agents, in all a total of 22,258 stems valued at £1,626 being exported mainly from June onwards.

The value of fruit (other than green limes, to which reference has been made elsewhere) exported in 1931 to 1933 was as follows:—

	1931.	1932.	1933.
	£	£	£
Bananas	—	—	1,626
Grapefruit	36	43	13
Oranges	169	206	141
Mangoes	2,172	1,655	1,212
Avocado pears	567	977	610
Pineapples	23	96	31
Miscellaneous	1,766	1,645	2,003

These figures are not by themselves impressive but a stage has now been reached at which progressive development should be possible and within the next few years the foundations of a fruit-growing industry of material value to the Colony may be laid.

Large quantities of *vegetables* of excellent quality are grown for the local market, the principal kinds being sweet potatoes, yams, string beans, lima beans and other kinds of legumes, bread-fruit, and tannia. Exports, however, are inconsiderable.

2. FORESTRY.

Forestry exploitation is of trifling importance in St. Lucia; there exists approximately 13,000 acres of Crown Lands in natural mixed forest in the island but no extensive stands of any one species are to be found.

In 1933 small quantities of fire-wood, boards, posts and other forest products were exported to neighbouring West Indian Islands, particularly Barbados and Martinique. The total value of these exports was £5,409, and of this value **charcoal** accounted for £4,327.

3. ANIMAL HUSBANDRY.

The general run of stock in the island is at present poor, but the Government has introduced some pedigree bulls, rams, and boars in order to improve it. Certain areas in the island are well suited for grazing and are gradually becoming stocked with improved herds. A dairying enterprise was commenced in 1931 and the prospects of establishing an animal industry appear to be good since very good mutton and pork could be produced locally, and there is a large market for meat available in Trinidad.

The estimated number of live-stock in the Colony in 1933 was:—

Horned cattle ...	8,000	Sheep	6,300	Horses	700	Asses	300
Pigs	8,000	Goats	800	Mules	700		

63 horses, 5 asses, and 23 mules valued at £425 were exported, all to Barbados, in 1933.

4. MINERALS.

So far as is known the Colony contains no mineral wealth. There are a few stone quarries.

5. FISHERIES.

There are no organised fisheries. Numbers of canoes and small sailing boats ply on the coasts of the Colony and some engage in fishing.

6. MISCELLANEOUS.

There is a small local bee-keeping industry. About 300 cwt. of *honey* valued at £362 were exported in 1933 to the United Kingdom.

B.

FOOD SUPPLY.

The Colony is self-supporting in certain classes of food-stuffs and certain other classes, which are at present imported, could probably be produced locally, but for certain food-stuffs, in particular flour, it will always necessarily remain dependent on imports.

The total value of imported food and drink in 1933 was £44,642 of which the principal items were the following:—

Article.	Value of imports, 1933. £	Principal sources of supply with values in 1933.
Wheat flour	15,426	Canada (£15,410).
Fish	5,843	Canada (£3,128), Newfoundland (£2,341).
Edible Oil	5,034	United Kingdom (£4,842).
Butter	2,328	United Kingdom (£856), France (£717), Canada (£497).
Rice	2,277	British Guiana (£2,267).
Butter substitutes	1,692	United Kingdom (£1,030).

VI.—Industry.

The only industrial establishments in the Colony are those engaged in preparing local products for the home market and for export. They are as follows:—

Lime-juice	16 factories	Rum	3 distilleries.
Sugar	4 factories	Bay oil	1 distillery.

No particulars of the number of persons employed, etc., are available.*

There are excellent facilities for coaling ships at Castries and this industry at one time afforded a good deal of employment for the inhabitants of the town. In 1931, however, the business fell away very seriously and the values of imports of bituminous coal dropped from £45,349 in 1930 to £5,159 in 1931. The imports for 1932 amounted to £22,711, and for 1933 to £23,955.

As a consequence the provision of employment for this section of the population has become a serious problem, as they are unaccustomed to agricultural pursuits and find it difficult to turn to agriculture for a living.

VII.—Other Economic Activities.

Entrepôt trade and the tourist traffic are of no importance in the economic life of the Colony.

VIII.—Communications.

There is an excellent road system capable of carrying the very considerable amount of motor and other wheeled transport which exists.

The towns, villages, and most of the large estates are connected with the capital by main roads, some sections of which are oiled. The approximate length of main roads is 127 miles.

A secondary system of by-ways leading into the interior, provides access to the valleys and a means of transport to the peasants. The total length of by-ways is 148 miles of which 56 are fit for motor traffic.

Seventy-four miles of "unclassified" roads, not fit for vehicular traffic, give access to the interior for pioneers.

There is a daily coastal motor boat service along the western or leeward side of the island, and a bus service to the windward side of the island.

Oversea communications are maintained by a variety of steamship lines.

The only regular direct service to Europe, is the fortnightly passenger and cargo service of the *Compagnie Générale Transatlantique* via Martinique, which also continues on the outward voyage via Trinidad to various South American ports. Steamers of the Harrison "Direct" Line and the Leyland S.S. Company also call *en route* to and from the United Kingdom when cargo offers.

Direct fortnightly services to Canadian ports are provided by Canadian National Steamships and the Ocean Dominion Steamship Corporation, also occasional outbound and home-bound calls by Canadian National Steamship cargo boats.

Monthly services to New York and various West Indian ports are provided by Furness, Withy, and Company Limited, and the Ocean Dominion Steamship Corporation.

Pan-American Airways provide a weekly seaplane service to various British and foreign ports in North and South America.

The only port of entry in the Colony is Castries, but vessels can clear at Vieux Fort and Soufrière. The total number of sailing vessels which called in 1933 was 328 vessels with a net tonnage of 9,141 tons. All of these, except three foreign vessels with a total of 129 net tons, were British.

The total number of steam vessels which entered in 1933 was 301 of a total net tonnage of 845,137 tons, made up as follows:—

	Vessels.	Net tons.
British	190	686,845
French	34	35,720
United States	20	30,616
Norwegian	24	28,365
German	7	13,700
Swedish	7	8,504
Other foreign	19	41,387
	301	845,137

The port of Castries is one of the best harbours in the West Indies. It is land-locked and provides facilities for coaling and watering ships and loading and discharging cargo which are unequalled in these islands.

The entrance is about a quarter of a mile wide with 7 to 9 fathoms depth on leading marks. There are 600 feet of wharves with a depth of 27 feet alongside.

IX.—Tariff.

Duties are levied on all imports with certain specified exceptions among which are a specified number which are free, when of British origin, but subject to an *ad valorem* duty of 10 per cent. when of foreign origin. Specific or *ad valorem* duties are charged on an extensive list of goods and all others not specially provided for are subject to a general *ad valorem* duty of 15 per cent. preferential and 22½ per cent. general. Imperial Preference is provided for in all cases, generally amounting to one-third of the general duty. A surtax of 25 per cent. of the duty is at present charged on all goods with a few exceptions.

X.—Trade Representatives, etc.

There are no official representatives of the Colony overseas except the West Indian Trade Commissioner maintained jointly by various West Indian Governments in Canada.

The Colony's interests are represented unofficially in the United Kingdom by the West India Committee.

ST. VINCENT.

I.—Area, etc.

The island of St. Vincent, the second largest of the Windward Islands, is situated in latitude 13° N. and longitude 61° W., 21 miles to the south-west of St. Lucia and 100 miles to the west of Barbados.

It is 18 miles in length and 11 in breadth and has an area of 133 square miles or, say, 85,100 acres.

The Colony also includes five of the Lesser Grenadines, a chain of islands lying between Grenada and St. Vincent, viz., Bequia, Mustique, Mayreau, Canouan, and Union Island, the total area of these islands being some 17·3 square miles, say 11,100 acres. The total area of the Colony is therefore about 150 square miles.

St. Vincent is one of the healthiest of the West Indian islands. The climate may be divided into two seasons, the dry season from January to May and the wet from June to December. The cooler months are December to April, but there is little variation in temperature throughout the year. In 1933 the highest monthly maximum at Kingstown, the capital of the Colony, was 86·4° F. in September and October and the lowest 82·3° F. in February; the highest monthly minimum was 76·5° F. in May and the lowest 71·3° F. in February. In 1933 the total rainfall was 115·48 inches, the highest monthly total being 16·49 inches in July and the lowest 2·95 inches in March.

As in other West Indian islands there is little Crown land in the Colony other than uncultivable and waste land. St. Vincent, as the following table shows, is predominantly a country of small holdings:—

Size of holding.	Number of holdings.	Total area involved. Acres.
"House Spots" (about 50 to 60 feet square) ...	3,884	—
Under 10 acres ...	4,907	11,756
11 to 50 acres ...	233	4,655
51 to 100 acres ...	30	2,135
101 to 1,000 acres ...	84	29,773
Over 1,000 acres ...	4	5,703
	<u>9,142</u>	<u>54,022</u>

Of the total area of the island some 34,000 acres are under natural forest.

No particulars regarding land-holding in the Grenadines are available.

II.—Population.

The latest Census of the Colony was taken in April, 1931, the population then being 47,961, being 3,514 more than at the 1921 Census.

Of this total 44,278 were resident in St. Vincent and 3,683 in the Grenadines.

No traces of the original Carib population now survive and the population at the Census was classified as follows:—

Negroes ...	33,257
Coloured ...	11,292
Europeans ...	2,173
Other ...	1,239
	<u>47,961</u>

The estimated population at the 31st of December, 1933, was 52,006.

Immigration and emigration are not of great importance in the economic life of the Colony. Almost the whole of the adult population of the Colony is engaged in agriculture.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The coinage current in the Colony is United Kingdom gold, silver, and bronze coinage and the "British Guiana and West Indies groat" or 4d. piece. United States gold coin is legal tender but is not current. Silver coin is legal tender for any amount.

The local coin of account is the "dollar" (\$1=4s. 2d., 1 cent.=½d.).

It is estimated that the coinage in circulation is between £4,000 and £6,000.

Notes issued by Barclays Bank (Dominion, Colonial, and Overseas) are in common use although not legal tender, the amount in circulation being £14,387 10s. 0d. The notes are issued in denominations of \$5, \$10, \$50, and \$100.

2. Barclays Bank (Dominion, Colonial, and Overseas) maintains a branch in the Colony and has a Savings Branch paying interest at 2 per cent. per annum.

The St. Vincent Agricultural Credit and Loan Bank is a private institution having as its principal object the advance of money to peasants on crops. Its paid-up capital is £4,832 10s. It maintains a Savings Branch, paying interest at the rate of 5 per cent. per annum on deposits. On the 31st of December, 1933, there were 584 depositors and the total amount deposited is £6,359.

There is a Government Savings Bank, the number of depositors on the 31st December, 1933, being 740 and the total amount deposited £14,946.

Four Agricultural Credit Societies exist, which make loans for periods not exceeding 12 months on a basis of mutual liability. Since their inception they have made total loans of £36,349, of which £151 was outstanding on 31st December, 1933.

B.—PUBLIC FINANCE.

1. Public Debt.

The Public Debt of the Colony comprises 12 small loans, the total amount outstanding on the 31st of December, 1933, being £92,023. Of these, five, totalling £53,758, have been made by the Colonial Development Fund, one for £26,636 raised through the Crown Agents, and the remainder have been issued locally, mostly in the form of debentures for comparatively small amounts. Of the total amount £1,610 comprises Municipal Loans to the town of Kingstown and £30,000 (advanced from the Colonial Development Fund) a loan to the St. Vincent Co-operative Arrowroot Association, for the repayment of which General Revenues are liable only in case of default by the principal.

The loans originally totalled £97,781, of which £5,757 has now been paid off, and another £6,653 is now available in various sinking funds.

2.—(a) Analysis of Revenue (on basis of Estimates for the year ending 31st December, 1934).

Self-balancing Departments.							Revenue.	Expenditure.
							£	£
Post Office	...	...	...	...	...	...	1,994	1,983
Electricity and telephones	...	...	...	...	...	...	3,990	3,697
							5,984	5,680
Net surplus £304.								
General Revenue.								
1. Customs:—						£	£	Percentage.
Import duties	...	...	...	...	...	29,500		
Export duties	...	...	...	...	...	2,200		
							31,700	49·9
3. Licences, Excise and Internal Revenue	...	...	...	...	...	21,398		33·7
4. Fees of Court, etc.	...	...	...	...	...	4,928		7·8
7. Miscellaneous, interest and other heads	...	...	...	...	...	5,105		8·0
9. Surplus on self-balancing Departments	...	...	...	...	...	304		0·6
							£63,435	100·0
Revenue of self-balancing Departments set-off against								
Expenditure	...	...	...	...	...	...	5,680	
Total							£69,115	

2.—(b) Analysis of Import duties for 1933.

Amount of duty collected on goods imported from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
Class I	7,364	5,840	2,396	15,600
Class II	15	122	469	606
Class III	4,463	3,520	3,018	11,001
Class IV	—	1	12	13
Total	£11,842	£9,483	£5,895	£27,220

3. *Analysis of Expenditure (on basis of Estimates for the year ending 31st December, 1934).*

	£	Percentage.
1. Debt Charges	3,696	5·8
2. Administration	20,458	32·4
3. Economic Development	6,364	10·0
4. Social Services	28,853	45·6
5. Defence	199	0·3
6. Non-effective, i.e., Pensions	3,620	5·9
Expenditure of self-balancing Departments set-off against Revenue... ..	£63,190	100·0
Total	£68,870	

4. As at the 31st December, 1933, the Colony's reserve fund amounted to £13,151, in addition to which there was a Permanent Investment Eruption Fund of £25,000.

5. The Colony has received the following grants and loans from the Colonial Development Fund.

- (1) A grant of £3,000 and a loan of £30,000 in connexion with the formation of the St. Vincent Co-operative Arrowroot Association.
- (2) A loan of £6,236 for a housing scheme.
- (3) A grant of £5,000 and a loan of £1,809 for the provision of improved water supplies and the construction of drains, incinerators, and dispensaries.
- (4) A loan of £10,000 for road development.
- (5) A loan of £6,400 for a cold storage and ice-making plant.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) to:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	84,198	28,371	2,631	115,200
1930	64,800	55,591	31,346	151,737
1931	44,600	36,690	31,875	113,165
1932	30,108	35,465	31,726	97,299
1933	34,263	43,453	41,414	119,130

(ii) *Domestic Exports by Classes, 1933.*

	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
<i>To:—</i>					
United Kingdom	22,871	10,769	—	—	33,640
Trinidad	8,802	8,187	2,225	213	19,427
Canada	13,604	—	413	—	14,017
Rest of Empire	3,082	261	211	299	3,853
<i>Total Empire</i>	48,359	19,217	2,849	512	70,937
United States of America... ..	35,593	—	—	—	35,593
Other foreign countries	5,264	205	266	—	5,735
<i>Total foreign countries</i>	40,857	205	266	—	41,328
GRAND TOTAL	89,216	19,422	3,115	512	112,265

(iii) *Principal Domestic Exports, 1933.*

Article.	Total Quantity.	Total value.	Principal Countries of destination with amounts in £'000.
<i>Class I.</i>		£	
Arrowroot	40,977 cwt.	55,510	United States of America (31), United Kingdom (17).
Syrup and Molasses	278,528 gal.	11,624	Canada (6), United States of America (5).
Sugar	850 tons	8,162	Canada (4), United Kingdom (4).
Animals and birds, living, for food—			
Pigs	2,637	3,422	Trinidad (3).
Other	—	2,492	
		5,914	
Vegetables—			
Sweet potatoes	7,909 bags	2,186	Trinidad (all).
Other kinds	—	1,168	
		3,354	

(iii) *Principal Domestic Exports, 1933—continued.*

Article.	Total Quantity.	Total Value.	Principal countries of destination with amounts in £'000.
<i>Class II.</i>			
Cotton, Raw—		£	
Sea Island	1,436 cwt.	8,107	United Kingdom (8).
Marie Galante (lint)	701 cwt.	1,619	United Kingdom (all).
	2,137 cwt.	9,726	
Copra	960 tons	8,978	Trinidad (7).
<i>Class III.</i>			
Cassava Starch	6,087 cwt.	3,110	Trinidad (2).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	49,548	42,822	30,516	122,886
1930	73,802	74,372	50,741	200,830*
1931	74,256	55,659	45,869	177,492*
1932	65,274	47,935	33,780	149,289*
1933	66,326	47,876	33,094	148,647*

(ii) *Imports by Classes, 1933.*

From:—	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
United Kingdom	13,750	248	52,321	7	66,326
Canada	16,074	1,743	7,410	—	25,227
Trinidad	3,988	71	4,556	19	8,634
British Guiana	4,225	248	98	6	4,577
Newfoundland	3,944	—	—	—	3,944
Barbados	1,350	9	435	9	1,803
Rest of Empire	993	9	2,688	1	3,691
<i>Total Empire</i>	44,324	2,328	67,508	42	114,202
United States of America... ..	2,323	4,622	15,354	1	22,300
Japan	—	—	3,662	—	3,662
France	1,197	1	423	—	1,621
Germany	—	—	1,334	—	1,334
Other foreign countries	1,425	42	2,433	277	4,177
<i>Total foreign countries</i>	4,945	4,665	23,206	278	33,094
Miscellaneous and unclassified	—	—	—	1,351	1,351
GRAND TOTAL	49,269	6,993	90,714	1,671	148,647

(iii) *Principal Imports, 1933.*

Article.	Total Quantity.	Total Value.	Principal Countries of origin with amounts in £'000.
<i>Class I.</i>			
Wheat Flour	17,027 cwt.	12,975	Canada (12).
Fish (all kinds)	5,198 cwt.	5,675	Newfoundland (4).
Sugar—			
Unrefined	337 tons	3,491	Barbados (3).
Refined	137 tons	1,565	United Kingdom (1).
	474 tons	5,056	
Tobacco—			
Cigarettes	15,798 lb.	4,036	United Kingdom (4).
Other kinds	15,995 lb.	582	
	31,793 lb.	4,618	
Rice	8,604 cwt.	3,910	British Guiana (3).
Butter and substitutes	59,175 lb.	2,801	United Kingdom (1).
<i>Class II.</i>			
Wood and Timber, unmanufactured—			
Lumber	700,970 feet	6,199	United States of America (4), Canada (2).
Shingles, Shooks, Staves, etc. —	—	7,066	United States of America (5), Canada (2).
		13,265	

* Includes Parcel Post, etc., not shewn in previous columns, the value of which was as follows:—

	£		£
1930	1,915	1932	2,300
1931	1,708	1933	1,351

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i> £	<i>Principal countries of origin with values in £'000.</i>
<i>Class III.</i>			
Cotton and Artificial Silk			
Manufactures—			
Piece-goods	779,686 yd.	15,307	United Kingdom (10).
Other kinds	—	3,273	United Kingdom (3).
		18,580	
Oils—			
Motor Spirit	69,142 gal.	2,022	Trinidad (all).
Illuminating	49,238 gal.	1,569	Trinidad (1).
Other kinds	42,262 gal.	1,843	
	160,642 gal.	5,434	
Boots and Shoes	2,685 doz. pr.	4,846	United Kingdom (3).
Iron and Steel manufactures	—	4,665	United Kingdom (4).
Motor Cars, etc., and parts...	—	4,621	Canada (2), United Kingdom (1).
Cement	5,879 barrels of 400 lb.	3,966	United Kingdom (2), Canada (1).
Apparel	—	3,275	United Kingdom (2).
Manures	382 tons	3,176	United Kingdom (2), United States of America (1).
Bags and Sacks	15,141 doz.	2,919	United States of America (1), United Kingdom (1).
Machinery	—	2,909	United Kingdom (2).
Soap (all kinds)	225,942 lb.	2,882	United Kingdom (2).

V.—*Natural Resources.*

A.

1. *AGRICULTURE.*

The economic resources of the Colony are exclusively agricultural, and considering its small size there is an extraordinary variety of production.

The main staple of the Colony is now **arrowroot**, St. Vincent being the principal source of the world supply. Arrowroot is a very pure form of starch derived from the rhizomes of *Maranta arundinacea*. The crop is usually reaped from the end of October to mid-June, and the fields are replanted immediately by reburying small pieces of the rhizomes. The rhizomes are washed and disintegrated, and the starch is extracted by washing. The average yield is about 10 barrels of starch per acre.

The dried starch is classified into one of six different grades on being delivered to the Co-operative Association. The grades are as follows:—(1) Extra-superfine, (2) Superfine, (3) Fine, (4) Good, (5) Fair, (6) Ungraded. About 75 per cent. of the starch, consisting chiefly of the lower grades, is exported to the United States of America in a pulverised form. Starch exported to other countries is usually in the granular form. Shipments are made chiefly in barrels containing 224 lb. of starch, but larger barrels containing 300 lb., kegs, and bags are occasionally used.

About four-fifths of the crop is grown on plantations and the remainder by peasant proprietors. All arrowroot for export is now graded, packed, and shipped by the St. Vincent Co-operative Arrowroot Association.

The quantity exported varied little from year to year until 1933, when there was a substantial increase, which was followed by a further increase in 1934, but the value of arrowroot dropped seriously in 1931 and has since remained at the low level then reached.

Exports during recent years have been as follows:—

	<i>Quantity in lb.</i>	<i>Value in £</i>
1928	3,870,420	64,508
1929	3,573,759	59,563
1930	3,590,348	59,019
1931	3,532,327	44,915
1932	3,704,833	47,524
1933	4,589,435	55,510

The destination of exports in 1933 was as follows:—

	<i>Quantity in lb.</i>	<i>Value in £.</i>	<i>Average value per lb.</i>
United Kingdom	1,523,663	16,661	2½d.
Canada	193,557	2,350	3d.
British Guiana	16,103	166	2½d.
British West Indies	37,360	494	3d.
United States of America	2,455,858	30,639	3d.
European countries	360,494	5,209	3½d.
Other foreign countries	2,400	36	3½d.

Cotton, which used to be the most important staple of the Colony, has now fallen to the second place. Like the other West Indian cotton industries it has recently been much depressed, but it is hoped that there will shortly be a substantial revival.

The quantity of cotton exported in recent years has been as follows:—

	<i>Sea Island.</i>		<i>Marie Galante.</i>	
	Quantity. lb.	Value. £	Quantity. lb.	Value. £
1929	282,903	24,261	63,274	2,373
1930	256,167	30,377	67,267	2,523
1931	456,089	25,463	33,809	704
1932	148,860	8,392	68,033	1,417
1933	160,792	8,107	78,508	1,619

Some Marie Galante seed cotton used to be exported, but exports have been inappreciable since 1928 and ceased altogether in 1931.

The area under cotton in 1932-33 was 1,469* acres and 1,935* acres in 1933-34.

Some difficulties were at one time experienced in maintaining a pure seed supply, but with the assistance of the Empire Cotton Growing Corporation the quality and purity of the strains have now been raised to a high standard.

Advances are made to peasant growers by the Government Cotton Ginnery and their cotton is ginned, baled, and shipped for them.

Sugar and allied products are produced to a small extent. One plantation has a modern sugar factory, the output for 1933 being estimated as 1,500 tons of which 950 tons, valued at £8,162 were exported, the remainder being consumed locally. Molasses and syrup are of more importance than sugar, the output for 1933 being 378,528 gallons, of which 278,528 gallons, valued at £11,624, were exported. There is a modern rum distillery, which is run in connexion with the sugar factory. In 1933, 40,182 proof gallons of rum were distilled, of which 13,839 proof gallons, valued at £1,475, were exported, 19,731 proof gallons, valued at £2,103 in bond, being consumed locally.

The following commodities were also produced in 1933.

(a) *Mainly or entirely for export.*

	<i>Estimated total production.</i>	<i>Estimated value. £</i>
Copra	959 tons	8,978
Cassava starch	7,873 cwt.	4,650
Cocoa	100 tons	2,333
Tomatoes	604 cwt.	500
Miscellaneous vegetables	110,000 lb.	496
Groundnuts	28 tons	389
Nutmegs	27,342 lb.	342
Mace	6,015 lb.	301
Ginger	3,440 lb.	24

(b) *For export and local consumption in approximately equal quantities.*

Tannias	4,449 cwt.	2,076
Peas and beans	2,155 cwt.	1,508
Plantains	10,860 stems	543
Yams	132,800 lb.	415
Bananas	2,880 stems	144

(c) *Mainly or entirely for local consumption.*

Sweet potatoes	1,750 tons	8,166
Coconuts	306,000 nuts	607
Limes	2,600 barrels	329
Oranges	77,200 oranges	110
Maize	167 cwt.	80
Grapefruit	8,970 grapefruit	15

Tomatoes and fruit produced for export are graded, wrapped, packed, and shipped by the Government Fruit and Vegetable Bureau.

Particular efforts are being made at present to encourage and develop the production for export of tomatoes, mangoes, and other fruit, and attention is also being given to the production of pulses and other dry grains for the West Indian markets.

A Government granary is maintained in conjunction with the cotton ginnery and at this maize is received and kiln-dried; a system of advances to peasant growers on grain delivered at the granary is in force.

2. FORESTRY.

Some 34,000 acres in the Colony are under natural or secondary forest, but no attempt is at present being made to develop these resources. Useful timber trees are limited and widely dispersed. The following trees occur:—*Tecoma leucoxydon*, *Terminalia catappa*, *Sterculia caribaea*, *Bursera simaruba*, *Cordia alliodora*, *Tabebuia serratifolia*, *Haematoxylon campechianum*, *Sideroxylon quadriloculare*, and *Hymenea courbaril*; the first four are relatively common.

3. ANIMAL HUSBANDRY.

The following table shows the information collected at the agricultural census of 1931.

<i>Animals.</i>	<i>Number.</i>	<i>Owned by Plantations. Per cent.</i>	<i>Peasants. Per cent.</i>	<i>Computed value. £</i>	<i>Exported in 1933.</i>
Swine	6,182	50	50	9,273	2,637
Cattle	6,070	40	60	24,280	70
Goats	5,813	15	85	1,844	2,642
Asses	2,365	15	85	1,184	150
Sheep	2,205	90	10	1,212	756
Horses	350	40	60	3,213	7
Mules	169	95	5	1,690	6

* Includes Marie Galante.

The Colony is self-supporting in fresh meat. There are no factories for the disposal of animals and animal products. The export markets are in the immediate neighbourhood, chiefly Barbados and Trinidad.

There is a privately-owned modern dairy farm which possesses some excellent pure-bred Jersey and other cattle.

4. MINERALS.

No minerals have been found in the Colony.

5. FISHERIES.

There are no organised fisheries in the Colony but the peasants practise a good deal of fishing, the catch being consumed locally. There are also small whaling stations on some of the smaller islands.

In 1933, 797 gallons of whale oil valued at £69 and 410 lb. of turtle shell valued at £121 were exported.

B.

FOOD SUPPLIES.

Although, so far as most of the principal essential food-stuffs are concerned, the Colony is, or could be, self-supporting, there are substantial imports of food and drink, the total value of imports of these classes in 1933 being about £45,000. The most important items were wheat-flour £12,975, almost entirely from Canada, fish of all kinds £5,661, mostly salted or dried fish from Canada and Newfoundland, and rice £3,910, almost entirely from British Guiana. Neither wheat-flour nor rice could be produced in the Colony.

VI.—Industry.

Industry is practically non-existent in the Colony, the only industrial establishment not employed in the conversion of agricultural products being an ice factory.

No information regarding the labour force, etc., of this factory or of the one rum distillery, four cotton ginneries, or the various establishments for grading and packing local produce is available.

VII.—Other Economic Activities.

Neither entrepôt trade nor the tourist traffic are of any importance in the economic life of the Colony.

VIII.—Communications.

St. Vincent is well provided with roads, the road system being divided into two sections, windward and leeward, with cross-communication between the two. The road communications are supplemented by coastal communication by motor launch and canoe, and while the communication between Kingstown the capital and the windward side of the island is carried on mainly by motor vehicle, communication with the leeward side is principally by launch and canoe.

The total length of roads in the island is 376½ miles of which 67½ are main roads, 177½ by-ways, 53½ Crown land roads, and 78 land settlement roads. 17½ miles of road are oiled and 50½ miles macadamized; the remainder are earth roads.

The roads in the Grenadines are 7½ miles in Bequia, about 10 miles in Union Island and about 3 miles in Canouan.

There is communication thrice weekly by sailing boat between St. Vincent and Bequia and weekly communication with the Southern Grenadines by the Government Sloop *Carib*.

Oversea communication with Canada is provided by the weekly mail, passenger, and cargo service of the Canadian National Steamships.

Steamers of other lines call at Kingstown at various intervals.

Mail and cargo for the United Kingdom and United States are also sent by sailing vessel to Barbados and Trinidad for transhipment there and inward mail and cargo is received by the same route.

There are four ports of entry in the Colony. All steam vessels, however, enter at Kingstown; sailing vessels also enter at Union Island. The other two ports, Georgetown and Barrouallie, are seldom used.

The total number of sailing vessels entered in 1933 was 230 (all British) of a total net tonnage of 7,250 tons.

The total number of steam vessels entered at Kingstown in 1933 was 196 vessels of a total net tonnage of 592,225 tons distributed as follows:—

	Vessels.	Tons.
British	126	498,829
Norwegian	32	39,242
United States	21	31,602
German	8	15,440
Swedish	3	4,583
Danish	1	1,924
Santo Dominican	4	440
Dutch	1	165

The anchorage at Kingstown is a wide open bay with depths of 18 to 20 fathoms within a quarter of a mile from the shore. The only harbour work is a landing stage or jetty extending 80 yards from the shore, and all cargo must be worked by lighters.

IX.—Tariff.

Import duties are charged on all imports except those specifically exempted. Specific rates are charged on a large number of specified goods. On the rest there are *ad valorem* duties which, with a few exceptions, are at the rate of 10 per cent. preferential and 15 per cent. general. In

all cases some measure of Imperial Preference is provided, generally amounting to one-third of the duty; in a few cases Empire goods are admitted free while foreign goods are subject to a duty of 5 per cent. *ad valorem*. All duties are at present subject to a surcharge of 12½ per cent. of the duty.

X.—Trade Representatives.

There are no official representatives of the Colony overseas except the West Indian Trade Commissioner maintained jointly by various West Indian Governments in Canada.

The Colony's interests are represented unofficially in the United Kingdom by the West India Committee.

FALKLAND ISLANDS AND DEPENDENCIES.

I.—Situation, etc.

The Falkland Islands lie in the South Atlantic Ocean some 300 miles east and somewhat to the north of the Straits of Magellan between latitude 51° and 53° S. and longitude 57° and 62° W., that is almost exactly the same latitude as the British Isles, but south of the Equator. There are two main islands known as the East and West Falklands which are divided by the Falkland Sound, and a group of about 200 smaller islands clustered around them within a space of 120 by 60 miles. The approximate area of the group is 4,618 square miles. Port Stanley, the capital of the Colony, is situated in East Falkland.

The Dependencies are divided into two main groups the one consisting of South Georgia with the South Orkneys and the South Sandwich Islands, and the other of the South Shetlands and Graham's Land.

The island of South Georgia lies about 800 miles to the east of the Falkland Islands, in 54½° South latitude; the South Orkneys and the South Sandwich Islands being 450 miles to the south-west and south-east, respectively, of South Georgia. This group is bounded by the fiftieth parallel of south latitude and by the twentieth and fiftieth meridians of west longitude; and the South Shetlands and Graham's Land by the fifty-eighth parallel of south latitude and by the fiftieth and eightieth meridians of west longitude.

South Georgia with an area of 1,450 square miles is the principal island in the Dependencies and is the only portion which is inhabited throughout the year, with the exception of a meteorological station maintained by the Argentine Government on Laurie Island in the South Orkneys.

In the Falkland Islands there are distinct summer and winter seasons, but the seasonal variations are less marked than those of the United Kingdom by reason of the scanty tree vegetation of the Islands. The mean average temperature is lower than in the United Kingdom. During 1933 the highest temperature registered at Stanley was 70° F. and the lowest temperature was 22° F. The total rainfall for the year was about 24 inches.

In the Dependencies the climate approximates closely to conditions in the Antarctic. In South Georgia the mountains are ice-bound and snow-capped throughout the year, and glaciers descend on a grand scale right to the sea. During 1933 the average mean temperature recorded at Grytviken, Cumberland Bay, South Georgia, was 34·97° F. Rain fell on 83 days and snow or sleet on 136 days.

Of the total area of the Colony, estimated at 2,955,520 acres, some 2,875,520 acres are in private ownership, and some 80,000 acres remain in the possession of the Government. Of this area it is estimated that some 2,248,320 acres are suitable for pasture.

The land is held for the most part in very large units. The estates of the Falkland Islands Company approximate to 1,000,000 acres; there are 4 estates of between 100,000 and 200,000 acres and 10 estates between 40,000 and 100,000 acres. Altogether excluding Government lands and urban sites there are only 30 estates in the Colony, one of under 10 acres, one between 100 and 1,000 acres and the remainder over 1,000 acres each.

The land of the Dependencies is owned by the Government. A few plots have been leased for use as whaling stations.

II.—Population.

The population of the Colony as shown by the 1931 Census was 2,392. 443 persons were engaged on sheep farming, and 284 were employed either by the Government or by the Falkland Islands Company.

There is no aboriginal population and the whole community is made up of European settlers, mostly English or Scotch, and their descendants.

On the 31st of December, 1933, the estimated population was 2,427, made up of 1,362 males and 1,065 females.

There is no permanent population in the Dependencies other than South Georgia. During the whaling season the population exceeds 1,000, almost all males. Out of that season it falls to 300 or even less. On 26th April, 1931, the combined population of South Georgia and the South Shetlands, as shown in the Census, was 708 males and 1 female. The majority are Scandinavian, the remainder British.

III.—Finance.

A. CURRENCY AND BANKING.

The legal tender currency is United Kingdom coinage and a paper currency of 10s., £1, and £5 notes issued by the Colonial Government under the Falkland Islands Currency Note Ordinance, 1930. During 1933 the currency note issue stood at £22,000.

There is a Government Savings Bank in the Colony, which is, as its name implies, solely a bank of deposit. There are no other banks of any kind. On the 31st December, 1933, the number of depositors was 1,032 and the total amounts standing to their credit was £181,190.

Remittances for the credit of any person or firm in the Colony can be made through the Commissioner of Currency and the Crown Agents for the Colonies, a charge being payable at the rate of 1 per cent. A similar service is undertaken by the Falkland Islands Company, who act generally as bankers or financial agents for the farm stations.

B. PUBLIC FINANCE.

1. There is no Public Debt.

2. (a) The Revenues of the Colony and Dependencies for 1934 were estimated at £58,530 and £21,570, respectively, but as the former figure includes a contribution of £9,000 by the Dependencies towards the cost of the Central Administration, the estimated net combined revenue was £71,100. In 1933 the actual revenue amounted to £85,680 in the case of the Colony, of which £2,312 accrued from appreciation of the market value of investments, and to £12,081 in the case of the Dependencies.

Analysis of Revenue (on the basis of the Estimates for the year 1934).

<i>Self-balancing Departments.</i>								<i>Revenue.</i>	<i>Expenditure.</i>
								£	£
Post Office	...	...	...	...	...	...	...	1,580	1,897
Wireless	...	...	...	...	...	...	...	1,935	1,378
Electrical and Telephones	...	...	...	...	...	...	...	805	1,721
Water supply	...	...	...	...	...	...	...	225	150
								<u>£4,545</u>	<u>£5,146</u>

Net deficit £801.

General Revenue.

<i>Head.</i>								£	Percentage.
The following Departments may be regarded as "self-balancing":—									
1. Customs	...	...	...	...	...	...	...	31,725	47·7
2. Dues, Licences, Fees, Internal Revenue, Crown Lands, rents, sales etc.	...	...	...	...	...	...	...	15,507	23·3
3. Interest	...	...	...	...	...	...	...	14,550	21·8
4. Miscellaneous	...	...	...	...	...	...	...	4,773	7·2
								<u>66,555</u>	<u>100</u>
Revenue of self-balancing Departments set off against Expenditure...								<u>4,545</u>	
								<u>£71,100</u>	

2. (b) *Analysis of Import Duties for 1933.**Amount of duty collected on articles imported from—*

					<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign countries.</i>	<i>Total.</i>
					£	£	£	£
<i>Class I</i>	...	...	...	...	4,998	Nil.	101	5,099
<i>Class III</i>	...	...	...	...	100*	Nil.	29	129
					<u>5,098</u>	<u>Nil.</u>	<u>130</u>	<u>5,228</u>

3. The estimated total expenditure for 1934 was £60,912 excluding the £9,000 contributed by the Dependencies towards the cost of the Central Administration.

Analysis of Expenditure (on the basis of the Estimates for the year 1934).

<i>Head.</i>								£	Percentage.
1. Administration	...	...	...	...	...	...	...	28,332	50·2
2. Economic Development	...	...	...	...	...	...	...	8,326	14·8
3. Social Services	...	...	...	...	...	...	...	15,905	28·2
4. Non-effective (pensions)	...	...	...	...	...	...	...	1,763	3·1
5. Defence	...	...	...	...	...	...	...	1,440	2·6
6. Loss on self-balancing Departments	...	...	...	...	...	...	...	601	1·1
								<u>56,367</u>	<u>100</u>
Expenditure of self-balancing Departments set off against Revenue								<u>4,545</u>	
								<u>£60,912</u>	

* Foreign goods on re-exportation from the United Kingdom.

4. The excess of the Colony's assets over its liabilities on 31st December, 1933, amounted to £290,673 as under:—

	£
Land Sales Fund	271,916
Other surplus (i.e. General Account)	18,757
	£290,673

The Dependencies had a surplus of assets over liabilities on 31st December, 1933, of £412,675, which was divided up as follows:—

	£
Research and Development Fund	407,814
"Discovery" Pension Fund	4,861
	£412,675

5. The Colony has not received any grant-in-aid since 1885.

IV.—Trade Statistics.

EXPORTS.

(i) *Total Exports (including Bullion and Specie) from the Colony and its Dependencies to:—*

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
1913	730,944	—	729,275	1,460,219
1930	1,733,666	—	1,206,448	2,940,114
1931	756,253	53,991	1,085,176	1,895,420
1932	238,750	—	242,614	481,364
1933	441,256	—	13,069	454,325

(ii) *Domestic Exports by Classes, 1933.*

To.—	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	—	109,186	332,070	—	441,256
<i>Total Empire</i>	—	109,186	332,070	—	441,256
Argentina	—	—	12,344	—	12,344
Other foreign countries	—	545	180	—	725
<i>Total foreign countries</i>	—	545	12,524	—	13,069
GRAND TOTAL	—	109,731	344,594	—	454,325

In addition fuel oil to the value of £10,125 was exported for use on "the High Seas."

These statistics of exports are really somewhat misleading. The enormous and progressive decrease in exports in the period 1929 to 1932 was due to the progressive restriction in non-pelagic whaling. The whale oil is a "domestic export" only in the most technical sense of the term, and the totals include some £103,000 worth of whale oil which is shown among the imports and should therefore be classified as a re-export. The real domestic exports of the Colony are the wool and minor animal products, of which particulars are given in section V below.

(iii) *Principal Domestic Exports, 1933.*

Article.	Total Quantity.	Total Value. £	Principal countries of destination with values in £'000.
<i>Class II.</i>			
Wool	4,021,444 lb.	100,749	United Kingdom (100).
<i>Class III.</i>			
Whale Oil	127,795 barrels	256,506	United Kingdom (254), Argentina (2).
Seal Oil	20,003 barrels	41,918	United Kingdom (41).
Guano	87,987 bags	41,674	United Kingdom (33), Argentina (8).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) into the Colony and its Dependencies from:—*

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
1913	152,958	4,351	85,784	243,093
1930	344,695	36,905	234,673	616,273
1931	200,910	6,638	150,202	357,750
1932	95,329	—	91,473	186,802
1933	94,711	—	175,107	269,818

(ii) *Imports by Classes, 1933.*

<i>From :—</i>	<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
	£	£	£	£	£
United Kingdom	26,167	23,310	44,474	735	94,686
<i>Total Empire</i>	26,167	23,310	44,474	735	94,686
Dutch West Indies	—	26,526	—	—	26,526
Norway	2,837	7,149	14,060	—	24,046
Uruguay	4,300	2,912	2,694	12	9,918
Argentina	4,825	283	1,807	—	6,915
Other foreign countries	613	3,090	912	—	4,615
<i>Total foreign countries</i>	12,575	39,960	19,578	12	72,125
GRAND TOTAL	38,742	63,270	64,052	747	166,811

In addition whale oil to the value of £102,982 was imported from the "High Seas," and bullion and specie to the value of £25 from the United Kingdom.

(iii) *Principal Imports, 1933.*

<i>Article.</i>	<i>Total Value.</i>	<i>Principal countries of origin with value in £'000.</i>
<i>Class I.</i>	£	
Provisions, unenumerated	26,060	United Kingdom (17), Argentine (4), Uruguay (2), Norway (2).
<i>Class II.</i>		
Whale Oil	102,982	High Seas (all).
Coal, Coke, and Oil Fuel	59,609	Dutch West Indies (26), United Kingdom (20), Norway (7), Uruguay (3), Canary Islands (3).
Timber	3,476	United Kingdom (3).
<i>Class III.</i>		
Hardware, Machinery and Ammunition	21,581	United Kingdom (13), Norway (7).
Drapery, Fancy Goods, Haberdashery, etc.	6,179	United Kingdom (5), Norway (1).
Canvas, Rope, etc.	5,408	Norway (3), United Kingdom (2).
Bags and bagging	5,308	United Kingdom (5).
Chemicals (crude and fine)	4,830	United Kingdom (3), Argentine (1).
Paints and Oils	4,485	United Kingdom (2), Norway (1), Uruguay (1).
Wearing Apparel	4,012	United Kingdom (4).

V.—Natural Resources.

A.

For practical purposes sheep farming is the sole industry of the Colony and at the present time wool is almost the sole export. When prices are remunerative, *skins*, *tallow*, and a small quantity of *hides* are shipped.

Sheep farming is carried on extensively rather than intensively; the farms vary in extent from 24,000 acres to 150,000 acres and carry on the average between 8,000 and 35,000 sheep, or, say, one sheep to between 3 and 5 acres.

Statistics of production, as opposed to export, of wool are not kept, but the two are, for practical purposes, identical. The average production during the past six years was four million pounds annually. The average price realized in 1933 was just over 6d. per lb. as against an average price of about 7d. per lb. in 1932, and 7½d. to 8d. per lb. in 1931.

Economic conditions were as difficult and disappointing in 1933 as in the preceding year. Prices for wool and other produce continued at levels which left little or no profit to farmers.

Although the number of sheep in the Colony had fallen from 800,000 in 1900, to 614,976 in 1933, the weight of wool per head had increased considerably, and in 1930 the average weight per fleece was 7·1 pounds compared with 5·1 pounds in 1890. The Romney strain of sheep, which predominates in every flock in the islands, is the best suited for local conditions and produces a wool for which there is a good demand. During 1933 a number of rams of the Romney Marsh type was imported from the United Kingdom for the purpose of improving flocks.

In addition to the sheep, the farms of the Colony carried the following stock in 1933:—3,388 horses, 9,699 cattle, and 73 swine.

It is estimated that during 1933 the total amount of production of sheep products was as follows:—

	<i>Quantity.</i>	<i>Value in £.</i>
Wool	4,021,444 lb.	100,749
Sheepskins	207 tons	8,055
Tallow	120 tons	1,768

All the above produce was exported.

In addition 46 tons of hides valued at £752 were produced and exported.

Almost all the wool is exported in the grease to London; it is estimated that about half this wool is, in due course, re-exported from the United Kingdom.

Exports of wool during recent years have been as follows:—

					<i>Quantity in lb.</i>	<i>Value in £.</i>
1929	...	...	...	...	4,068,057	236,992
1930	...	...	...	...	3,690,572	190,943
1931	...	...	...	...	3,931,593	125,818
1932	...	...	...	...	3,934,852	109,475
1933	...	...	...	...	4,021,444	100,749

All Falkland Islands wool falls into the crossbred category. The quality is somewhat coarser than Punta Arenas wool and ranges from 46's to 50's according to the conventional standard. It is particularly suitable for high grade hosiery. It commands a fair average price compared with other wools of comparable quality and a somewhat higher price than Patagonian wool. Non-pastoral agriculture can hardly be said to exist, although it is of interest to observe that the acreage under cultivation, mainly of forage crops, is increasing.

There are no forests, and no mineral deposits suitable for working have been discovered.

The Falkland Islands Sealing Company, Limited, which has confined its activities to the production of oil from hair seal, discontinued operations in 1931 and 1932 owing to the unfavourable market. The Company was successful, however, in disposing of the stocks remaining unsold from previous seasons, and in 1933 it operated for a short period of three months and produced approximately 300 tons of oil from hair seal of an export value of £4,660. Owing, however, to unfavourable market conditions the Company was unable to show a profit on the season's working and unless conditions show some appreciable improvement it is doubtful whether the Company will operate in a future season.

In the Dependencies whaling, and, on a smaller scale sealing, are the only industries. The whaling season is restricted to the period from the 16th of September to 31st May annually, while sealing operations are carried on at South Georgia from 1st March to 31st October. It is proposed to restrict the whaling season still more in the near future.

The catch for the whole of the 1934 season amounted to 4,438 seals, as against 5,987 seals in 1933, a decrease of 1,549 seals. The yield of oil amounted to 8,896 barrels as compared with 12,252 barrels in 1933, being a decrease of 3,456 barrels. The average yield per seal was practically the same as that for 1933, being 2.0 barrels compared with 2.04 barrels in 1933. For the purpose of comparison the following table shows the catch, production of oil and the average per seal for the past five seasons:—

<i>Season.</i>				<i>No. of Seals.</i>	<i>Production.</i>	<i>Average.</i>
1930	...	...	...	5,814	10,616	1.828
1931	...	...	...	5,929	11,580	1.953
1932	...	...	...	5,172	9,867	1.907
1933	...	...	...	5,987	12,252	2.046
1934	...	...	...	4,438	8,896	2.004

The decrease in the catch, allowing for the shorter working period, is chiefly due to the adverse weather conditions and to the fact that the bays in Divisions I and IV were unworkable for days at a time owing to ice. The hauling up of the seals was later than in 1933.

Owing to the continued slump in the market price of oil, whaling operations were very closely curtailed during the 1933-34 season. No floating factories operated under licence from the Government, although a good number of expeditions fished on the high seas and off the ice-pack, the catch being restricted by agreement on a quota basis. The land station at Deception Island remained closed, fishing being suspended entirely at the South Shetlands and also at the South Orkneys. At South Georgia only two of the five land stations conducted operations.

The number of whales taken was 2,346, made up of 1,728 fin, 536 blue, 92 humpback, 7 sperm and one right whale; 132,190 barrels of oil, and 123,996 bags of guano were produced.

The output of oil and guano at land stations during recent years has been as follows:—

					<i>Oil.</i> <i>Quantity in barrels.</i>	<i>Guano.</i> <i>Quantity in bags.</i>
1929	...	...	...	...	242,950	242,720
1930	...	...	...	...	188,044	181,152
1931	...	...	...	...	124,337	113,420
1932	...	...	...	...	54,583	49,572
1933	...	...	...	...	132,190	123,996

The figures of export from the Dependencies are in excess of these figures, the surplus representing the products of pelagic whaling operations which are exported through the Dependencies.

B.

FOOD SUPPLY.

The Colony has a very limited range of local production and is necessarily dependent on importation for almost all kinds of foodstuffs other than meat. Natural conditions are such as to render it impossible for the Colony to become self-supporting.

VI.—Industry.

Apart from the operations connected with conversion of the local products for export there is no industry of any kind in the Colony or Dependencies.

VII.—Other Economic Activities.

None.

VIII.—Communications.

There are no railways in the Colony and no roads beyond the town of Stanley and its immediate vicinity. Internal communication is carried out on horseback or by boat.

The inter-insular service alike for passengers and for mails devolves principally on the s.s. *Lafonia*, a vessel of some 600 tons deadweight belonging to the Falkland Islands Company, facilities being arranged as far as practicable so as to afford connexions with in-coming and out-going sailings for overseas. Communication between Stanley and the outside world is effected principally through Montevideo, to which port a service is maintained, in accordance with actual requirements by the s.s. *Lafonia*, which is running on a mail contract for a period of five years from October, 1931. In addition, calls are made at Stanley by cargo vessels of the Pacific Steam Navigation Company, but these tend to become more irregular and infrequent partly on account of the depression in trade. Since the opening of the Panama Canal the passenger vessels of this Company have visited the Colony at increasingly rare intervals, and recently they have arrived once only in the year in the course of a tourist cruise round South America.

The distance from Stanley to Monte Video is rather more than a thousand miles and the time taken on the voyage by the s.s. *Lafonia* average $4\frac{1}{2}$ days, and by other vessels from 3 to 5 days according to the class of vessel.

The average time occupied in the transit of mails to and from the United Kingdom, via Monte Video, is 28 days; by the direct route passenger vessels complete the journey in the same time and the cargo vessels require upwards of a month to five weeks on the voyage home, which is performed almost invariably from Stanley to London without intermediate stop, and on the outward voyage upwards of five weeks dependent on the number of intermediate stops.

On the average, opportunities for the receipt and despatch of mails occur every four to five weeks.

The contract with the Tonsberg Whaling Company for the conveyance of mails to and from South Georgia was terminated in the early part of 1933, and provisional arrangements were made with the Falkland Islands Company, Limited, for the maintenance of communication by the s.s. *Lafonia*, which makes four voyages a year usually in March, June, October, and December. The time taken on the voyage between Stanley and South Georgia averages $3\frac{1}{2}$ days.

During the whaling season, October-April, opportunities occur from time to time for the conveyance of mails between Europe and South Georgia by means of floating factories and transports engaged in the Whaling Industry. There is also a fairly reliable service three times in the year between Buenos Aires and Grytviken by the motor auxiliary s.v. *Tijuca* of the Compania Argentina de Pesca.

In 1933 the following vessels were entered at the ports shown from ports outside the Colony and Dependencies:—

Port.	British vessels.		Foreign vessels.	
	Number.	Net tonnage.	Number.	Net tonnage.
Stanley	15	34,219	—	—
Fox Bay (West Falkland)	4	139	1	268
South Georgia	40	88,025	14	20,987

IX.—Customs Tariff.

Import duties are charged only on beer, wines, spirits, tobacco, and matches. A preferential rate is charged on bottled British wines, the duty being 4s. 6d. per dozen reputed quarts as against a duty of 6s. 9d. per dozen reputed quarts on other wines. Import duties at the rate of nine-tenths of the general tariff rates are charged on cigars, cigarettes, cut and manufactured tobacco, and snuff manufactured in any part of the British Empire from tobacco which is the produce of any such part. The import duty on matches does not apply to matches manufactured in and consigned from the United Kingdom or any part of the British Empire.

X.—Trade Representatives.

There is no official Trade Representative in London. The Falkland Islands Company, Limited, which was formed in 1851 and has its head office at 61, Gracechurch Street, London, E.C.3, is an important commercial organization carrying on business in the Colony.

DEPENDENCIES IN THE WESTERN PACIFIC

FIJI.

I.—Situation, etc.

1. The Colony of Fiji comprises a number of islands in the southern Pacific Ocean. The Fijian Group situated between latitude 15° and 22° S. and longitude 177° W. and 175° E. comprises about 250 islands of which about 80 are inhabited.

The largest islands are Vitilevu (4,053 square miles), in which is situated Suva, the capital of the Colony (1,743 miles from Sydney, New South Wales and 1,140 miles from Auckland, New Zealand), Vanualevu (2,128 square miles), Taveuni (166 square miles), and Kadavu (165 square miles).

The islands of Rotuma (14 square miles in all), a dependency of Fiji, lie somewhat to the north and east.

The total area of the Colony, including Rotuma, is approximately 7,083 square miles. Of this area about three-sevenths is of a mountainous character and suitable only for forest, while another two-sevenths is mountainous but suited for cattle.

The mountains in the main islands rise to a height of between 3,500 and 4,500 feet.

2. The climate is comparatively cool for the tropics and varies little from month to month. In 1933 the highest absolute maximum of the year was 96° F. in January and the lowest monthly maxima were 80° F. in June, 78.6° F. in July and 79.3° F. in August, whilst the lowest absolute minimum was 62° F. in July, and the highest monthly minimum 76.3° F. in February.

Rainfall is considerable. The Colony is divided into so-called "dry districts" in which the average rainfall over a period of years has varied from about 62 to 84 inches, and the so-called "wet districts" in which it has varied from 90 to 210 inches. Considerable variations occur from year to year. In 1930, which was a year of drought, rainfall was in some cases only 30 per cent. or 40 per cent. of the normal.

In 1931 the rainfall was somewhat above the normal and quite exceptional figures were recorded at Nadarivatu, in Colo North. The total for the year was 268 inches, of which 97 inches fell in February, 24.20 inches falling on a single day. The total for the year 1932 was even higher, 333 inches, of which 90 inches fell in February, while the total for 1933 was 151.4 inches.

Hurricanes are experienced from time to time and a particularly severe one visited the Colony in February, 1931, causing heavy loss of life and considerable damage to property and food-crops.

3. Most of the land in the Colony belongs to the natives, but prior to the British occupation European settlers had acquired large areas of land from the native chiefs and the total area of land alienated to settlers, either as freehold or on long lease is now about one-fifth of the Colony. Since 1912 it has been illegal to sell native land except to the Government, but leases up to 99 years are permitted. At the end of 1933 the following land had been alienated or was in process of alienation:—

<i>Nature of title.</i>	<i>Number of titles.</i>	<i>Area in acres.</i>
Freehold	1,592	532,605
Leases of Crown land ...	745	20,928
Leases of native land ...	7,929	318,268
	10,266	871,801

The Government holds "open to settlement" in various parts of the Colony some 180,000 acres of land suited for such various purposes as cattle and sheep runs, coconut, rubber, and banana plantations.

II.—Population, etc.

1. The main and original population of the Colony is Fijian and Rotuman, but there is a very large domiciled community of Indian origin, and smaller European, half-castes, Polynesian and Chinese communities.

The estimated population on the 31st of December, 1933, was as follows:—

Fijian	96,656
Rotuman	2,521
European	4,804
Half-caste	3,661
Indian	80,991
Polynesian	1,878
Chinese	1,476
Others	1,251
	193,238

The Fijian race is perhaps the only Melanesian race in the South Pacific Islands which has passed the point of decline and is on the up grade. In 1870 the population was estimated (perhaps wrongly) at 300,000, in 1881 it was 114,748; and in 1891, 105,800; in 1905 just under 87,000. From 1905 to 1911 it was stationary and rose to 91,000 in 1917. It was reduced by the influenza pandemic of 1918 to 85,569, and has since been rising steadily. Other sections of the population are also increasing.

2. The Fijians are all members of land-owning tribal units, and have the right to use a portion of the tribal lands for cultivation or cattle raising; they do not normally accept paid employment except in order to earn money for some specific purpose. About 10 per cent. of the adult males are so employed at any one time, but the period of employment of any individual seldom exceeds a year at a time. Only very few leave their communities to become regular wage-earners.

Their employment falls mainly under the five following classes:—agricultural labourers, casual labourers, artisans, seamen, and domestic servants.

Indians mostly cultivate small holdings or allotments and also serve as contract labourers. The principal employer is the Colonial Sugar Refining Company, which has, however, adopted the policy of encouraging the Indians and Fijians to grow on their own holdings crops of sugar cane for purchase by the Company. The number of labourers in direct employment has therefore decreased considerably; the approximate figure having shrunk from 3,000 in 1932 to 1,000 in 1933.

There is no unemployment among the Indians. From a comparative small plot of land an Indian farmer can draw all the requirements for himself and his family except clothing.

Europeans and half-castes are employed principally in various skilled and industrial capacities.

The Chinese are for the most part market-gardeners, artisans, and traders.

Of the whole agricultural community approximately 60 per cent. is dependent for its livelihood directly or indirectly on the Colonial Sugar Refining Company.

3. Immigration and emigration are no longer important factors in the economic life of the community. Indian immigration and emigration are now trivial, the movement in either direction not amounting to more than about one-half per cent. in 1933.

III.—Finance.

A.—CURRENCY AND BANKING.

1. In the early months of 1934, a new local coinage was put into circulation to replace the United Kingdom coin previously current. The new issue has three silver coins, 6d., 1s. and 2s., and two cupro-nickel pierced coins of the values $\frac{1}{2}$ d. and 1d. There is a local issue of currency notes of 6 denominations, ranging from £20 to 5s. The total value of notes in circulation at the end of 1933 was £504,401, and the amount of the new coinage issued up to the 31st August, 1934, was £25,320.

Until March, 1933, the external exchange value of the currency was maintained by the Banks at the same rate as that of New Zealand, but at the end of that month steps were taken to fix the value at £100 sterling = £111 Fijian by empowering the Fiji Currency Commissioners to exchange Fijian currency notes into sterling at that rate and vice versa, subject to the payment of a small commission on each transaction. All amounts in this memorandum are expressed in Fijian currency.

2. There are two branches of the Bank of New Zealand, and three branches of the Bank of New South Wales, in the Colony.

There are no agricultural or co-operative banks in the Colony.

3. There is a Government Savings Bank (13,234 accounts, total deposits £236,210 at the end of 1933), but the Government transacts no other form of banking business.

B.—PUBLIC FINANCE.

1. The total public debt on 31st December, 1933, was £1,211,459. This entails interest charges amounting in a full year to £58,853 and sinking fund contributions amounting to £17,590.

The value of the sinking funds on the 31st of December, 1933, was £72,453, made up as follows:—

5 per cent. 1946...	...	...	...	...	...	£
Supplementary Sinking Fund...	...	...	...	...	...	20,626
5 per cent. 1955...	...	...	...	...	...	7,905
4 per cent. 1959...	...	...	...	...	...	3,640
						£72,453

Particulars of the loans are as follows:—

Specific 1946 loan of £765,000 sterling at 5 per cent. Ordinance No. 7 of 1928.

Public Purposes 1955 loan of £171,408 sterling at 5 per cent. Ordinance No. 2 of 1929.

Public Works 1959 loan of £154,996 sterling at 4 per cent. (£160,000 authorized). Ordinance No. 14 of 1932.

The only Loan which is a Trustee security is the 5 per cent. Loan of £765,000.

The other two loans are Inter-Colonial Loans and are not on the market.

2.—(a) The estimated revenue of the Colony for 1934 is £574,828.

Analysis of Revenue (on the basis of the Estimates for the year 1934).

Self-balancing Departments.

	Revenue.	Expenditure.	Net Surplus.
	£	£	£
Post Office	25,145	23,154	1,991

General Revenue.

<i>Head.</i>	<i>£</i>	<i>Percentage.</i>
1. Customs	303,300	55·5
2. Port, Harbour, Wharf, and Light dues	20,320	3·7
3. Native taxes	16,000	3·0
4. Licences, Excise, and Internal Revenue not otherwise classified	92,280	16·9
5. Fees of Court or Office. Payments for specific services and reimbursements-in-aid	59,215	10·8
6. Rents	14,280	2·6
7. Interest	32,335	6·0
8. Miscellaneous	6,520	1·2
9. Land Sales	100	—
10. Surplus of self-balancing Department	1,991	0·3
	546,341	100
Revenue of self-balancing Department set-off against Expenditure	23,154	
Colonial Development Fund... ..	5,333	
	£574,828	

2.—(b) Analysis of Import Duties for 1933.

<i>Class.</i>	<i>Amount of duty collected on Articles imported from:—</i>			<i>Total.</i>
	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	
	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
I	25,199	85,522	1,330	112,051
II	85	2,971	155	3,211
III	56,800	46,452	53,328	156,580
IV		Classification not possible.		4,322
	82,084	134,945	54,813	276,164

3. The estimated annual expenditure for 1934 is £598,611.

Analysis of Expenditure (on the basis of the Estimates for the year 1934).

<i>Head.</i>	<i>£</i>	<i>Percentage.</i>
1. Deficit on self-balancing Department	Nil	—
2. Charges on account of public debt	78,647	13·6
3. Administration	228,146	39·6
4. Economic development	73,236	12·7
5. Social services	159,668	27·7
6. Non-effective (Pensions)	31,939	5·7
7. Defence	3,821	0·7
	575,457	100
Expenditure of self-balancing Department set-off against Revenue	23,154	
	£598,611	

4. *Reserve Fund.*—The Colony has no specific reserve fund but the surplus of Assets over Liabilities at the end of 1933 amounted to £201,214 in addition to £146,131 held in an Immigration Fund.

5. With the exception of grants from the Colonial Development Fund no grants-in-aid have been received during recent years and none have been asked for in the future. Colonial Development Fund grants have been as follows:—

	<i>£ Sterling</i>
1931. Cuvo-Yako and Trans-insular Roads	5,000
Suva Water Supply	100
1932. Suva Water Supply	412
1933. Cuvo-Yako and Trans-insular Roads	5,000
Suva water supply	285
	10,797

*IV.—Trade Statistics.**EXPORTS.**(i) Total Exports (including Bullion and Specie) to:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
1913	41,085	1,375,334	9,521	1,425,940
1930	457,846	709,550	313,258	1,480,654*
1931	121,103	736,881	139,121	997,105*
1932	847,053	777,128	72,568	1,696,749*
1933	849,213	717,360	156,040	1,722,613*

* Excluding ships' stores, the value of which was as follows:—

	<i>£</i>		<i>£</i>
1930	3,872	1932	2,215
1931	3,082	1933	2,916

(ii) Domestic Exports by Classes, 1933.

To:—	Class I. £	Class II. £	Class III. £	Class IV. £	Class V. £	Total Merchandise. £
United Kingdom	664,395	72,106	20	—	—	736,521
Canada	501,603	25	—	—	—	501,628
New Zealand	89,900	51	1,130	10	—	91,091
Australia	24,223	10,641	26	12	13,500	48,402
Rest of Empire	2,953	1,828	4,362	2	—	9,145
<i>Total Empire</i>	<u>1,283,074</u>	<u>84,651</u>	<u>5,538</u>	<u>24</u>	<u>13,500</u>	<u>1,386,787</u>
Europe... ..	—	114,509	—	—	—	114,509
United States of America ...	1	21,267	17	—	—	21,285
Other foreign countries ...	1,841	7,349	388	—	—	9,578
<i>Total foreign countries</i> ...	<u>1,842</u>	<u>143,125</u>	<u>405</u>	<u>—</u>	<u>—</u>	<u>145,372</u>
Ships' stores	2	—	—	—	—	2
GRAND TOTAL	<u>1,284,918</u>	<u>227,776</u>	<u>5,943</u>	<u>24</u>	<u>13,500</u>	<u>1,532,161</u>

(iii) Principal Domestic Exports, 1933.

<i>Article.</i>				<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Countries of destination with values in £'000.</i>
<i>Class I.</i>						
Sugar	...	...	...	113,836 tons	1,080,782	United Kingdom (656), Canada (500), New Zealand (24).
Fruit—						
Fresh						
Bananas	...	...	...	326,422 bunches	69,243	New Zealand (58), Australia (11).
Mandarines	...	...	...	4,317 cases	2,263	New Zealand (2).
Oranges	...	...	...	3,034 cases	1,119	New Zealand (all).
Pineapples	...	...	...	2,684 cases	1,007	New Zealand (1).
Other kinds	...	...	...	—	281	
Canned						
Pineapples	...	...	...	380,711 lb.	5,582	Germany (2), New Zealand (1), Canada (1), United Kingdom (1).
Preserved				...	10	
					79,505	
<i>Class II.</i>						
Copra	...	...	...	22,597 tons	195,788	Europe (104), United Kingdom (64), United States of America (21).
Trocas shell	...	...	...	365 tons	19,945	Europe (10), Australia (4), Japan (3), United Kingdom (2).
<i>Class V.</i>						
Gold, raw	...	...	...	2,079 oz.	13,500	Australia (all).

IMPORTS.

(i) Total Imports (including Bullion and Specie) from:—

	United Kingdom.	Rest of Empire.	Foreign Countries.	Total.
	£	£	£	£
1913	152,998	671,774	79,196	903,968
1930	373,694	668,809	141,958	1,219,184*
1931	258,171	538,464	107,676	929,514*
1932	250,748	488,954	95,748	857,346*
1933	36,151	562,192	119,315	1,069,226*

(ii) Imports by Classes, 1933.

From—	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United Kingdom	31,195	657	298,099	—	329,951
Australia	137,709	22,376	218,824	977	379,886
New Zealand	31,493	1,874	54,341	66	87,774
India and Burma	24,663	63	14,516	—	39,242
Canada	13,865	11,984	12,326	—	38,175
Rest of Empire	4,323	1	10,389	2	14,715
<i>Total Empire</i>	<u>243,248</u>	<u>36,955</u>	<u>608,495</u>	<u>1,045</u>	<u>889,743</u>

* These totals include imports by parcel post, the value of which was as follows:—

	£		£
1930	34,723	1932	21,896
1931	25,203	1933	21,608

(ii) Imports by Classes, 1933—continued.

From—	Class I. £	Class II. £	Class III. £	Class IV. £	Total Merchandise. £
United States of America ...	2,651	141	39,639	—	42,431
Japan	5	—	39,264	—	39,269
Dutch East Indies ...	—	—	18,794	—	18,794
Other foreign countries ...	964	443	17,414	—	18,821
<i>Total foreign countries ...</i>	<i>3,620</i>	<i>584</i>	<i>115,111</i>	<i>—</i>	<i>119,315</i>
Parcel Post	—	—	—	21,608	21,608
GRAND TOTAL	246,868	37,539	723,606	22,653	1,030,666

In addition bullion and specie to the value of £38,600 was imported during 1933.

(iii) Principal Imports, 1933.

Class I.	Article.	Total Quantity.	Total Value. £	Principal countries of origin with amounts in £'000.
Sharps and Pollard ...	...	4,610 tons	35,815	Australia (all).
Tobacco—				
Manufactured	...	75,826 lb.	22,520	Australia (22).
Cigarettes	...	17,826 lb.	7,131	United Kingdom (6).
Other kinds	...	3,468 lb.	346	
		96,545 lb.	29,997	
Flour and Wheat Meal ...	...	2,307 tons	18,622	Australia (18).
Fruit and Vegetables—				
Fruit				
Fresh	...	111 tons	2,749	Australia (1), New Zealand (1).
Dried	...	107 tons	2,204	Australia (1).
Preserved	...	24 tons	1,093	Australia (1).
		242 tons	6,046	
Vegetables				
Potatoes	...	1,486 tons	6,459	New Zealand (3), Australia (3).
Onions	...	699 tons	2,718	Australia (2).
Other fresh	...	74 tons	1,460	Australia (1).
Preserved	...	20 tons	1,033	
		2,279 tons	11,670	
		2,521 tons	17,716	
Spirits—				
Whisky, in bottle ...	...	7,405 gal.	8,684	United Kingdom (7), Australia (1).
Whisky in bulk	...	5,295 gal.	5,839	United Kingdom (5).
Other kinds	...	2,610 gal.	2,000	
		15,310 gal.	16,523	
Fish	...	352 tons.	15,593	Canada (13), United Kingdom (1).
Tea	...	223,414 lb.	15,045	Australia (8), New Zealand (6).
Meats—				
Beef, canned	...	153 tons	8,103	New Zealand (5), Australia (3).
Bacon, Hams, etc. ...	...	32 tons	3,105	New Zealand (3).
Other kinds	...	34 tons	1,724	New Zealand (1).
		219 tons	12,932	
Class II.				
Timber—				
Rough	...	1,769,590 sq. ft.	12,001	Australia (6), Canada (6).
Dressed	...	963,236 „	7,003	Canada (6),
Other kinds	...	371 lin. ft.	35	
			19,039	
Coal... ..	...	21,331 tons	15,659	Australia (5).
Class III.				
Drapery	...	—	141,159	United Kingdom (88), Japan (34).
Hardware	...	—	78,979	United Kingdom (32), Australia (31), New Zealand (6), United States of America (4).
Oils—				
Motor Spirit	...	1,214,771 gal.	37,307	United States of America (16), Dutch East Indies (10), Australia (10).
Kerosene	...	404,636 gal.	15,881	United States of America (9), Dutch East Indies (6).
Other kinds	...	79,559 gal.	9,391	United Kingdom (4), Australia (3).
		1,698,966 gal.	62,579	

(iii) *Principal Imports, 1933—continued.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of origin with amounts in £'000.</i>
<i>Class III.—contd.</i>			
<i>Machinery and Implements—</i>			
Sugar-making	—	34,885	Australia (27), United Kingdom (7).
Other kinds	—	24,913	United Kingdom (13), Australia (8).
		59,798	
Bags and Sacks	151,197 doz.	45,299	Australia (36), India (7).
Cinematograph films...	3,864,416 ft.	35,418	New Zealand (22), Australia (13).
Manure	4,808 tons	31,744	United Kingdom (20), New Zealand (5), Germany (4).
<i>Motor cars, etc., and parts—</i>			
Motor cars and lorries ...	122	15,711	United Kingdom (11), Canada (4).
Tyres and tubes	—	7,917	Canada (4), United Kingdom (3).
Tractors and parts	—	1,096	United States of America (1).
		24,724	
Fancy goods	—	17,545	United Kingdom (11), Australia (2), Japan (1), New Zealand (1).
Iron and Steel Manufactures	1,190 tons	16,778	United Kingdom (15), Australia (1).
Drugs	—	14,176	United Kingdom (7), Australia (6).

V.—*Natural Resources, etc.*

A.

1. *AGRICULTURE.*

The resources of the Colony are almost exclusively agricultural.

The most important product is **sugar**, the production of which is entirely controlled by the Colonial Sugar Refining Company, an Australian Company with refineries in Australia and New Zealand.

Approximately eighty-five per cent. of the cane grown is produced by Indians, principally tenant farmers working on land leased from the Company; a little is grown by Fijians, who are being encouraged to take an interest in cane-growing; and the rest is grown in the Company's own plantations. The Company purchases cane from the cane-growers at a fixed price.

The Company owns five mills, four on Vitilevu and one on Vanualevu. These mills are understood to be well-equipped and the Company's cost of production compares favourably with those of other Empire producers.

The crushing season lasts from June to December, and the sugar is exported as it is made. The total crop varies widely from year to year according to climatic conditions.

The area cropped and the total crop for each crop year for the past five years were:—

	<i>Area Cropped. Acres.</i>	<i>Yield of Cane. Tons.</i>
1929 ¹	37,713	754,264
1930	37,781	669,150
1931	38,789	663,473
1932	39,055	530,737
1933 ²	44,672	1,079,160

Exports in recent years have been:—

	<i>Sugar.</i>		<i>Molasses.</i>	
	<i>Quantity in Tons.</i>	<i>Value in £.</i>	<i>Quantity in Tons.</i>	<i>Value in £.</i>
1929	72,275	881,263	9,845	9,845
1930	90,979	853,833	12,337	12,337
1931	67,937	624,310	9,019	9,019
1932	131,302	1,289,239	9,448	9,448
1933	113,836	1,180,782	12,937	12,937

The sugar is exported principally to the United Kingdom and Canada. Small quantities are occasionally sent to New Zealand.

There is no production of rum in Fiji.

Coconuts.—Although the combined value of the products exported falls behind that of sugar, the cultivation of the coconut palm is, from the point of view of area cultivated, over three times as important as that of sugar. It is estimated that in 1933 the area under coconut palm was 131,000 acres.

Production is organized both on a system of European-owned estates of varying size and also on a system of Fijian communal ownership, each system being responsible for about half the total production.

The labour on the estates is largely Fijian working on one-year contracts.

The principal product exported is copra, and there is some export of fresh coconuts. The following table shows the figures of the last five years:—

	<i>Copra.</i>		<i>Coconuts.</i>	
	<i>Quantity in Tons.</i>	<i>Value in £.</i>	<i>Number.</i>	<i>Value in £.</i>
1929	33,226	563,978	357,161	1,075
1930	23,882	369,524	298,886	895
1931	16,917	177,786	300,860	906
1932	15,076	170,240	330,930	994
1933	22,597	195,788	251,330	754

The falling off in exports in recent years is due principally to the drought of 1930 and the bad weather of early 1931 and largely to the great fall in prices. All sections of the copra-producing community have suffered from the price decline, which continued throughout 1933. There is no doubt that many European-owned estates were worked at a loss, but there has been no general tendency towards the breaking up of estates or the foreclosure of mortgages. A Committee was appointed to consider what measures of assistance to the industry were possible and certain export charges have been remitted. The Fijian producer is not so seriously affected by the low price, but is tempted to neglect his plantations.

A local Committee is carrying out investigations into insect pests, the erection of hot-air copra driers of approved design, and general educational work among Fijian growers.

Bananas.—The third most important agricultural product from the point of view of export is bananas, which are grown both for export and for local consumption. For export the bananas are detached from the stem and packed in cases, each case containing 80 lb. of fruit, the equivalent of two stems or bunches. Export takes place throughout the year, but tends to fall off somewhat in the late winter months.

Exports during recent years have been as follows:—

		Quantity in Bunches.	Value in £.			Quantity in Bunches.	Value in £.
1929	...	384,858	107,280	1932	...	346,968	67,237
1930	...	169,044	57,178	1933	...	326,422	69,243
1931	...	194,875	57,368				

Exports of recent years have been much below those in the period before the war, largely owing to a prohibitive duty of 1d. per lb. imposed in Australia in 1921. During the years 1921 to 1932 almost the only market was New Zealand. As a result of the Agreement concluded at Ottawa, however, Fiji is permitted to export to Australia 40,000 centals, equivalent to 50,000 cases or 100,000 bunches at a reduced duty of 2s. 6d. per cental. The market however was not found to be profitable as charges such as Primage and Sales Tax considerably increased the taxation on shipments to the Commonwealth. As a consequence only 20,542 cases were exported to Australia during 1933. Against this must be set the fact that in the summer of 1932 His Majesty's Government in New Zealand found it necessary, owing to the pressure of bananas on the home market, particularly from the Dominion's dependencies, to limit imports from Fiji to an annual quota of 142,800 cases.

The possibilities of building up an export trade to Western Canada are being examined. An area has been planted to provide fruit for experimental shipments early in 1935 to Canada.

The crop is one which comes to maturity very quickly and new areas can be brought into bearing within 12-15 months.

The production is divided approximately in the following proportions:—

		Per cent.			Per cent.
Fijian	...	78	Indian	...	4
Chinese	...	15	European estates	...	3

but the export is almost entirely in the hands of Europeans, the marketing being strictly controlled by regulations made under the Fruit Export Ordinance, 1906.

Rice is grown for domestic consumption only and is of no importance from the point of view of export, but the value of the annual crop probably exceeds that of the banana. The annual output is increasing. Almost the whole is grown by Indian peasant cultivators cultivating plots of from one to five acres each. The milling of paddy is principally a home industry carried on by Indian families; until 1933 the Government operated a mill at Suva, and two merchant firms and a number of Indians carry on small mills.

During the year 1933 the Government notified paddy growers that it would not purchase their crops after the conclusion of the 1933 season and that the Government Mill would cease operations when existing stocks had been disposed of. It was considered that the purchase of paddy and milling rice by Government had achieved its object by establishing within 12 years a permanent producing and milling industry of such proportions as to render importations of rice unnecessary under normal conditions.

Seven hundred and forty-two tons of rice were imported in 1921, the year in which the Government Mill commenced operations. The imports for the five years 1929-1933 were 1,636, 955, 3,533, 648, 280 tons respectively which serves to indicate the steady progress towards self-sufficiency with regard to the rice industry which the Colony has made. The increased imports in 1931 were due to the disastrous hurricane which swept the Group in that year. The significance of these figures is emphasized when it is remembered that the Indian population, which subsists largely on rice, has increased considerably since 1921 and also that the Fijian race now consumes large quantities of rice. The 280 tons imported in 1933 were not economically necessary as the stock held by the Government Mill alone was in excess of that amount.

Thirty-three privately owned power-driver hullers, averaging approximately two tons per 10-hour day in capacity, were in operation in 1933, and it is expected that at least five more will be in operation in 1934.

The estimated acreage and yield for 1933 was 12,000 acres and 15,000 tons of paddy respectively. Other agricultural products are of secondary importance.

Pineapples are grown to a limited extent for export. From time to time considerable areas of the Smooth Cayenne variety have been planted for canning purposes. The canning industry has not progressed as well as preliminary experiments and subsequent reports on the various "packs" indicated that it should, owing principally to the small financial resources on which the Companies have attempted to operate. The Fiji Pineapple Company's factory at Ovalau has not operated since 1931 and the West Coast Pines Limited of Nandi ceased operations in 1933. The future of the latter undertaking is uncertain.

In 1933 some 240 acres were under pineapples. Exports in recent years have been as follows:—

			<i>Fresh pines.</i>		<i>Canned pines.</i>	
			<i>Cases.</i>	<i>Value.</i> £	<i>Cases.</i>	<i>Value.</i> £
1929	...	...	6,170	1,848	3,119	2,276
1930	...	...	7,633	2,296	7,798	6,593
1931	...	...	5,607	1,510	8,128	5,961
1932	...	...	1,776	668	14,565	8,095
1933	...	...	2,684	1,007	9,193	5,582

Citrus.—The citrus industry is in its infancy, but has progressed satisfactorily and indications are that a profitable minor industry may be developed. The preparation of the fruit for export, consisting of colouring, grading, wrapping, and packing is carried out by the Department of Agriculture at the expense of the consignor. The bulk of fruit exported consists of mandarins, oranges, and a small quantity of limes. Grapefruit of excellent quality are offered in the local market and sufficient quantities will be available for export in the near future.

Exports for the past five years have been as follows:—

			<i>Cases.</i>				<i>Cases.</i>
1929	...	...	5,206	1932	...	...	3,225
1930	...	...	3,065	1933	...	...	7,345
1931	...	...	2,743				

Minor Fruits and Vegetables.—The following fruits:—citrus fruits and melons, and vegetables:—kumalas, tomatoes, Mauritius beans and pumpkins are grown in small quantities for export, quantities exported in recent years being:—

			<i>Fresh fruit</i> <i>value in £.</i>	<i>Fresh Vegetables</i> <i>quantity in cwt.</i>	<i>value in £.</i>
1929	...	...	2,644	11,108	7,444
1930	...	...	341	8,568	5,459
1931	...	...	1,919	9,922	4,988
1932	...	...	1,116	5,891	1,875
1933	...	...	3,663	3,647	1,228

Tomatoes and Mauritius beans, the latter being used as a green manure, go to Australia, and the remainder principally to New Zealand.

Food-Stuffs.—Large quantities of food-stuffs, particularly yams, taro, tapioca, kumalas, kawai, bread fruit, bananas, plantains, oranges, and mandarins, are grown for local consumption by the Fijians. No reliable statistics of production exist, but the quantities are ample to provide food for the Fijians with a margin for sale or barter. The Indians grow dhall, beans, and other vegetables as well as rice for their own consumption and for sale.

Indians and a few Fijians grow a small quantity of cotton principally of the Sea Island variety. In 1933 633 acres were under cotton, the crop being ginned at the ginneries at Lautoka and Sigatoka. The total crop amounted to 36,458 lb. of lint.

Exports of recent years have been:—

			<i>Cotton</i> <i>quantity in lb.</i>	<i>value in £.</i>	<i>Cotton Seed</i> <i>quantity in tons.</i>	<i>value in £.</i>
1929	...	...	49,115	3,348	53½	194
1930	...	...	127,077	6,727	99	346
1931	...	...	78,932	1,146	—	—
1932	...	...	101,997	5,100	—	—
1933	...	...	34,870	2,300	—	—

Tobacco grows luxuriantly in almost every part of the Colony, but is not yet exported.

Fiji tobacco, grown and cured by Fijians and Indians, is largely used locally. A limited number of cigars is rolled by hand by Indians and some cut tobacco is now offered for sale locally.

A number of varieties of tobacco are at present undergoing trial at the Government experimental station at Navuso.

2. FOREST PRODUCTS.

Some 2,366,000 acres are under unclassified forest. It is estimated that about 3,000,000 sup. feet of all kinds is cut annually, and almost the whole is sold locally.

There are three timber concessions covering an area of about 292,024 acres.

Most of the forest lands are owned by the natives, who may make grants of cutting rights subject to Government approval under the Forests Ordinance, 1913.

3. ANIMAL HUSBANDRY.

The live-stock of the Colony was estimated as follows in 1933:—

Horned cattle	...	...	68,117	Goats	...	...	20,209
Horses	}	...	14,776	Pigs	...	...	3,395
Asses				Sheep	...	...	695
Mules							

Cattle are bred on most European-owned coconut estates; the market for fat stock is however restricted to the limited numbers required by the ten local butcheries and prices are low. There is no export trade in beef and the only local meat cannery closed in 1930.

Indian peasant farmers own a considerable number of cattle, almost every settler having a few milking cows and a pair of plough-bullocks.

Dairy-farming is carried on in three pastoral districts within easy reach of Suva by Europeans assisted by Indian labourers. The internal market for butter is protected by a duty of 4d. preferential, 8d. general per lb. with the result that imports are negligible. The protective tariff has also enabled an export trade to be built up.

Production and export during recent years have been as follows:—

			<i>Production quantity in lb.</i>	<i>Export quantity in lb.</i>	<i>Value in £.</i>
1929	...	...	392,214	79,968	5,747
1930	...	...	440,277	101,136	6,496
1931	...	...	490,055	180,544	7,519
1932	...	...	543,815	271,152	11,299
1933	...	...	557,976	204,744	7,564

In view of the low prices for butter on the world market, the local dairying companies are going in more extensively for the production of ghee, imports of which during recent years have varied from about 250,000 to 340,000 lb. annually valued at from £5,700 to £7,700.

Pigs are bred on a number of dairy farms, but the market is limited to the local demand for pork.

The breeding of sheep is under trial but difficulties are being experienced from intestinal parasites and blow flies.

A co-operative scheme for marketing has been under consideration for some time, including proposals for the establishment of a central abattoir and various attached departments. It is thought that if this can be established the consumption of locally killed beef might be doubled and imports of canned meat, which were valued at approximately £37,000 in 1928, £14,000 in 1930 and £9,000 in 1933, might be eliminated.

It is not anticipated, however, that anything except a small local export trade could be built up.

4. MINERAL RESOURCES.

Until recently the Colony did not possess any proved mineral wealth. Prospectors have in the past found numerous ore deposits containing various metals, more particularly copper, but, until recently, no metal had been found in quantity sufficient for commercial exploitation. During the last two years, however, deposits of gold ore have been found at Yanawai on the island of Vanualevu and at Tavua on the island of Viti Levu, and are being extensively prospected and developed for mining on a commercial scale. Pilot battery and cyanide treatment plants have been erected in each locality and there appears to be every indication that these plants will justify the erection of larger works capable of profitably treating large quantities of ore in the near future.

There is also some evidence that gold deposits of the same rather unusual type as those already proved may exist over a wide area in the Colony.

311 oz. of gold valued at £2,053 were won and exported in 1932, and 2,079 oz. valued at £13,500 in 1933.

5. FISHERIES.

There are no established fisheries, properly so called, in the Colony, but there is a certain small export trade in bêche-de-mer, trocas shell, turtle shell, and pearl shell. The trocas shell is obtained by natives diving around the coral reefs in fairly deep water; experiments are being made with a diving dress. Exports in recent years having been as follows:—

			<i>Bêche-de-mer cut.</i>	<i>£</i>	<i>Trocas shell tons.</i>	<i>£</i>	<i>Turtle shell lb.</i>	<i>£</i>	<i>Pearl shell lb.</i>	<i>£</i>
1929	...	...	1,049	6,044	191	11,476	1,908	2,774	—	—
1930	...	...	2,672	13,886	193	11,209	1,196	1,729	1,120	15
1931	...	...	2,864	16,045	183	7,371	1,881	1,594	24,304	216
1932	...	...	2,073	8,801	266	12,125	1,400	879	21,504	193
1933	...	...	255	1,348	365	19,945	1,687	1,041	12,824	128

B.—FOOD SUPPLY.

As stated above the Colony cannot at present dispense with some imports of rice and canned meats, but there is some prospect of replacing these from local sources.

The only really important food-stuff, of which all supplies must necessarily be imported, is flour. Supplies are derived almost entirely from Australia. There is also a variety of semi-luxuries, such as tea, alcoholic liquors, and edible oil, which can be supplied only from overseas sources.

VI.—Industry.

Industry in the Colony is confined almost entirely to the application of simple conversion processes to locally produced raw materials. In this class fall the following establishments:—

Sugar mills	...	5	Rice mills	...	24	Cotton gineries	2	Pineapple cannery	1
Butter factories	...	2	Copra dryers	...	28	Butcheries	...	11	

Other industrial establishments in the Colony are a biscuit factory, which supplies almost the whole domestic market and produced about 40 tons of plain biscuits valued at £1,919 for export to neighbouring Pacific Islands in 1933, and a soap factory which supplies part of the domestic market and produced 154 tons of plain soap valued at £4,388 for export to neighbouring Pacific Islands in 1933.

VII.—Other Economic Activities.

Fiji serves to some extent as an entrepôt for neighbouring islands, both British and foreign. Excluding cinematograph films which are by far the most important item, and coin and bullion, which has bulked very large in some years, re-exports have amounted to anything from a little under £40,000 to a little over £80,000 annually during the last 5 years.

Tourist traffic is encouraged by the efforts of a local Publicity Board.

VIII.—Communications.

By the end of 1933 there were about 550 miles of roads fit for motor traffic in the Colony and about 1,600 miles of bridle tracks, and the process of converting bridle tracks into motorable roads is being carried steadily on.

There is a fairly extensive service of public motor char-à-bancs and lorries in certain districts, the total number of vehicles in service in 1933 being 238 carrying from 8 to 24 passengers each.

The Colonial Sugar Refining Company maintains 380 miles of permanent way of 2-foot gauge in two areas in Vitilevu and one in Vanualevu. These railways are primarily for the transport of cane to the various sugar mills under the control of the Company, but the length from Sigatoka to Tavua (220 miles in length including branch lines) provides a free passenger service.

Inter-island communication is maintained by two subsidized vessels (one of 382 and one of 122 tons) which give at least a monthly service to the most important islands from Suva. Various small vessels and launches provide a frequent service to the coastal ports of Vitilevu.

Fiji is a port of call on the main ocean lines crossing the Pacific.

The Canadian-Australasian Royal Mail line gives a four-weekly service in both directions to Sydney, Auckland, and Vancouver; and two other vessels give a four-weekly service, one to Sydney and the other to Auckland, Tonga, and Samoa.

The Matson Navigation Company (a United States Company) gives a four-weekly service to Sydney in one direction and Honolulu and San Francisco in the other.

Vessels arrive from London via Panama at intervals of about six weeks. Fourteen sailing vessels (8 British and 6 foreign) of a total tonnage of 1,396 tons and 138 steam and motor vessels (95 British and 43 foreign) of a total tonnage of 754,486 tons entered the Colony from ports outside the Colony in the course of 1933.

The three principal ports of the Colony are Suva, Levuka, and Lautoka.

At Suva the maximum available depth of water at wharfs L.W.O.S.T. is 32 feet; there are 1,500 feet of such deep water wharves and 750 feet having lesser depth.

At Levuka the figures are 35 feet and 700 feet respectively.

At Lautoka the figures are 24 feet and 150 feet respectively.

At Suva and Levuka only 900 and 600 feet of wharf respectively are available for the largest vessels.

IX.—Tariff.

Duties are levied on a large number of articles named in the tariff list at specific or *ad valorem* rates, the latter varying from 10 per cent. to 40 per cent. A number of other articles are specifically exempted from duty. All other articles are subject to an *ad valorem* duty of 20 per cent. preferential, and 40 per cent. general. In the case of all dutiable articles, except motor-spirit, imports of Empire origin receive a preference, the margin below the general rate of duty varying from $\frac{1}{2}$ to $\frac{3}{4}$ of the duty where a specific duty is charged, and being 20 per cent. *ad valorem* where an *ad valorem* duty is charged.

In addition to customs duty there is levied on all imports, whether dutiable or not, a Port and Service Tax at the rate of 2 per cent. *ad valorem*.

The Importation of Textiles (Quota) Ordinance, 1934, introduced a system of import quotas applicable to textile goods of foreign manufacture; additional protection is thereby given to goods of Empire origin.

X.—Trade Representatives.

The Colony maintains no trade representatives abroad and there are no overseas representatives in the Colony.

THE GILBERT AND ELLICE ISLANDS COLONY.

I.—Situation, etc.

The main group of islands of which the Gilbert and Ellice Islands Colony is comprised consists of 25 islands, lying in mid-Pacific along the 180th meridian of longitude. This collection of scattered coral atolls is intersected by the equator, with the Colony headquarters, Ocean Island, lying slightly to the westward and a still larger group of atolls, namely Fanning, Washington, and Christmas Islands lying some 1,800 miles to the east.

The area of Ocean Island is about 1,500 acres and the aggregate area of land contained in the whole Colony amounts to less than 200 square miles.

From a geological point of view Ocean Island stands alone in the Colony, being an elevated cone, rich in phosphate of lime and attaining a height of 280 feet above sea level.

All the other islands belong to the subsiding type, due to the failure of the coral polyps to keep pace with the rate of emersion. Of these latter atolls none rise much higher than 15 feet above sea level or exceed 5 furlongs in width from beach to beach.

Generally speaking the average rainfall is fairly high, with the exception of Ocean Island and the Gilbert Islands which are subject to drought. In 1933 at Funafuti (representing the Ellice Islands) the rainfall was 161.75 inches whereas at Ocean Island and Tarawa (representing the Gilbert Islands) it was only 50.81 and 61.56 inches respectively. The wettest months are usually December, January, and February, while the months of least rainfall are September and October. In normal seasons the annual rainfall ranges from 50 inches in the vicinity of the equator to about 100 inches in the Northern Gilbert Islands and 150 in the Southern Ellice Islands.

Under existing legislation in the Colony the sale of land to non-natives is prohibited and leasing is subject to various restrictions. Fanning and Washington Islands are in the hands of a private company. A licence was issued to Central Pacific Coconut Plantations Limited in 1914, granting them the exclusive right for a period of 87 years to occupy Christmas Island for the production and export of coconuts, coconut products, pearl shell, and guano.

II.—Population, etc.

The population of the whole Colony on the 31st December, 1933, based on returns received from the various districts was 34,085, of which 33,445 were natives, 396 Chinese, and 244 Europeans.

The population of Ocean Island amounted to 2,074 of which 660 were Banabans, 929 Gilbert and Ellice Islanders, 372 Chinese, 112 Europeans, and 1 Fijian.

There is no indigenous population in Fanning, Washington, and Christmas Islands, the sole inhabitants being labourers recruited from other islands for the copra industry, the European supervising staff and, in Fanning Island, the staff of the cable station.

In Ocean Island the British Phosphate Commissioners employ some 70 Europeans, 525 Gilbertese, and 350 Chinese in mining operations. About 100 natives are employed under indenture in the coconut plantations of Fanning and Washington Islands. There is no other form of employment in the Colony (apart from such minor occupations as seafaring and domestic service).

The great bulk of the native population is occupied in the cultivation of the coconut palm and other native foodstuffs.

III.—Finance.

A.—CURRENCY AND BANKING.

There is no local issue of currency, Australian currency being the ruling medium of exchange throughout the Colony.

There are no banks in the Colony except an agency on Ocean Island of the Commonwealth Bank of Australia (Savings Bank Branch) which transacts Savings Bank business only.

The Government accepts deposits of cash from natives for safe-keeping and repays them on demand through any financial officer in the Colony.

B.—PUBLIC FINANCE.

1. There is no public debt.

2. The Colony's financial year ends on the 30th of June, the revenue for the year 1932-33 being £59,400.

The estimated revenue for 1933-34 is £56,660.

*Analysis of Revenue (on the basis of the Estimates for the year ended 30th June, 1934).
Self-balancing Department.*

	Revenue.	Expenditure.
Posts and Telegraphs Department	£819	£1,892
Net deficit	£1,073	
<i>General Revenue.</i>		
	£	Per cent.
1. Customs (Import and Export duties)	22,500	40.2
2. Native taxes, etc.	5,871	10.5
3. Licences and internal revenue not otherwise classified ...	10,664	19.1
4. Royalties	6,350	11.5
5. Interest	3,681	6.6
6. Fees of Court, etc.	5,190	9.3
7. Miscellaneous	1,585	2.8
	55,841	100.0
Revenue of self-balancing Department set-off against Expenditure	819	
	56,660	

2. (b) Analysis of Import Duties for 1932-33.

It is not possible to give accurate figures as to the amount of duty collected on goods imported from the United Kingdom, the rest of the Empire and foreign countries, but the following table shows the amount of duty collected according to Classes.

	£
Class I	10,400
Class II	2,745
Class III	6,245
Class IV	92
	£19,482

3. The expenditure for the year 1932-33 amounted to £46,753.

The estimated expenditure for 1933-34 is £56,299.

Analysis of Expenditure (on the basis of the Estimates for the year ended 30th June, 1934).

	£	Percentage.
1. Loss on self-balancing Department	1,073	1·9
2. Debt charges	—	—
3. Administration	32,274	58·1
4. Economic Development	1,428	2·6
5. Social Services	19,321	34·9
6. Defence	106	0·2
7. Non-effective (Pensions, etc.)... ..	1,278	2·3
	55,480	100·0
Expenditure of self-balancing Department set-off against Revenue	819	
	56,299	

4. The excess of assets over liabilities on 30th June, 1933, was £124,011. The surplus funds are held partly in London and partly in Australia.

In June, 1934, legislation was enacted whereunder the British Phosphate Commissioners, in return for exemption from payment of certain licence fees, capitation taxes and Customs import duties on all goods of British manufacture or origin—with the exception of alcoholic liquors, tobacco, cigars, and cigarettes—undertake to pay to the Government the equivalent of the difference between the total revenue received and the total amount expended by the Government during each year in which the enacting Ordinance remains in force. This legislation became operative as from the 1st July, 1934, and is to remain in force provisionally for a period of five years.

IV.—Trade Statistics.

Only the simplest trade statistics are collected.

EXPORTS.

(i) Total Exports (including Bullion and Specie).

					£
1913 ...	...	...	...	...	330,518
1929-30*...	...	...	...	...	351,496
1930-31*...	...	...	...	...	225,463
	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Grand Total.</i>	
	£	£	£	£	
1931-32* ...	—	231,449	33,819	265,268	
1932-33* ...	—	349,525	48,543	398,068	

(ii) Domestic Exports by Classes, 1932-33.*

To	Class I.	Class II.	Class III.	Class IV.	Total Merchandise.
	£	£	£	£	£
Australia	—	266,264	—	—	266,264
New Zealand	—	83,261	—	—	83,261
Total Empire	—	349,525	—	—	349,525
Japan	—	32,846	—	—	32,846
United States of America.	—	15,141	—	—	15,141
China	556	—	—	—	556
Total foreign countries	556	47,987	—	—	48,543
GRAND TOTAL	556	397,512	—	—	398,068

(iii) Principal Domestic Exports, 1932-33.*

Article.	Total Quantity.	Total Value.	Countries of destination with amounts in £'000.
Class II.		£	
Phosphate of Lime	224,200 tons	302,670	Australia (188), New Zealand (83), Japan (31).
Copra	8,995 „	94,842	Australia (78), United States of America (15), Japan (1).

IMPORTS.

(i) Total Imports (including Bullion and Specie).

						£	
						103,559	
						148,779	
						209,925	
						114,511	

* For the year ending 30th June.

† Includes imports from unspecified places (£8,174) and imports into Fanning, Washington and Christmas Islands (£11,990).

(ii) Imports by Classes, 1932-33.*

From	Class I. £	Class II. £	Class III. £	Class IV. Total Merchandise. £	£
United Kingdom	1,283	12	16,022	85	17,402
Australia	27,554	6,873	16,812	261	51,500
Rest of Empire	9,405	280	1,076	—	10,761
Total Empire	38,242	7,165	33,910	346	79,663
United States of America	7,297	774	5,907	—	13,978
Other foreign countries	3,493	2,418	6,591	103	12,605
Total foreign countries	10,790	3,192	12,498	103	26,583
Unspecified	2,798	278	4,667	431	8,174
Imports into Fanning, Wash- ington and Christmas Islands	—	—	—	—	11,990
GRAND TOTAL	51,830	10,635	51,075	880	126,410

In addition there were imports of Bullion and Specie from Australia to the value of £3,500.

(iii) Principal Imports, 1932-33.*

Article.	Total Quantity.	Total Value. £	Principal countries of origin with amounts in £'000.
Class I.			
Provisions	—	20,936	Australia (12), New Zealand (3), United States of America (1), China (1), United Kingdom (1), Canada (1).
Tobacco—			
Unmanufactured	36,004 lb.	7,180	United States of America (6), Australia (1).
Manufactured	11,011 lb.	3,081	Australia (3).
	47,015 lb.	10,261	
Rice	—	7,055	Australia (2), Burma (2), India (1).
Fruits and Vegetables	—	3,085	Australia (2), China (1).
Sugar	—	2,936	Fiji (1), Australia (1).
Flour	—	2,312	Australia (2).
Class II.			
Coal	3,591 tons	4,027	Australia (all).
Timber.....	196,419 s. ft.	3,526	Australia (3).
Crude Petroleum	157,386 gal.	2,422	Dutch East Indies (2).
Class III.			
Drapery	—	13,479	United Kingdom (8), Australia (2), China (1), Japan (1).
Oils—			
Benzine	27,666 gal.	1,963	United States of America (1).
Kerosene	27,090 „	2,013	United States of America (1).
Lubricating... ..	10,915 „	2,207	United States of America (1).
	65,671 „	6,183	
Hardware, cutlery, etc.	—	4,692	Australia (2), United Kingdom (1).
Medical goods... ..	—	1,700	
Machinery	—	1,695	Australia (1).

V.—Natural Resources.

A.

1. AGRICULTURE.

Owing to the physical structure of the islands of which the Colony is comprised only a very limited range of agricultural production is possible. A considerable proportion of the cultivable land is now in use and no substantial increase of agricultural development is possible.

The only agricultural export is copra, which is produced throughout the Colony with the exception of Ocean Island.

The average quality of the copra produced is steadily improving and at times a high standard is attained. All copra is sun dried. Unfortunately there is no attempt at grading, all qualities being sold in the world market as "South Sea Sun Dried." The main bulk of copra is shipped to various European ports, including France, and until recently shipments were made to the United States of America also. The production of copra is not seasonal and is carried on throughout the year. Only native copra is produced in the Colony; it is either purchased by local traders or sold direct by the natives to the shippers, the most important of whom are Messrs. Burns Philp (South Sea) Company, Limited, and Messrs. On Chong and Company, Sydney.

* For the year ending 30th June.

The quantities and values of copra exported during the five years 1928-29 to 1932-33 are shown in the following table:—

Year.				Quantity in tons.				Value in £.
1928-29	...	...	...	4,122	...	...	...	55,657
1929-30	...	...	...	5,465	...	...	...	83,691
1930-31	...	...	...	6,548	...	...	...	65,480
1931-32	...	...	...	6,715	...	...	...	67,150
1932-33	...	...	...	8,995	...	...	...	94,844

2. FOREST PRODUCTS.

There are no forests.

3. ANIMAL HUSBANDRY.

There is no grazing for cattle, or even goats in the Colony, the only live-stock which can be reared being swine and poultry.

4. MINERAL.

Phosphate of lime constitutes the most important product of the Colony and is mined in Ocean Island by the British Phosphate Commissioners. These deposits are extremely rich and the phosphoric acid reaction of the deposits at Nauru and Ocean Island is higher than any other known. The table below shows the quantities and values of phosphate exported during the five-year period 1928-29 to 1932-33:—

Year.	Quantity in tons.	Rate per ton £ s. d.	Value in £.
1928-29	233,820	1 5 0	292,275
1929-30	207,863	1 5 0	259,829
1930-31	145,122	1 2 0	159,634
1931-32	142,200	1 7 0	191,970
1932-33	224,200	1 7 0	302,670

With developments of plant completed during 1929-30 the annual output of raw phosphate can be increased to 400,000 tons.

5. FISHERIES AND MARINE PRODUCTS.

Pearl shell exists in the lagoons at Christmas Island and Onotoa (Southern Gilberts) but is not at present being exported.

There are plentiful supplies of fish, the fish of most commercial importance being the *palu* or castor-oil fish, which abounds in the Ellice Group, but there is not at present an established fishing industry.

B.

The fruit of the coconut and pandanus palms, course edible tubers of taro (*calladium*) and babai (*alocassia indica*) are the staple food products laboriously cultivated by the native inhabitants, supplemented by fish and occasionally pigs and poultry. So far as these native food-stuffs are concerned, the Colony is self-supporting, but as fresh meat, vegetables, and fruit are for practical purposes unobtainable, and as the local resources of Ocean Island are insufficient to support the labour force situated there, there is a substantial import of food-stuffs, and particularly "European" food-stuffs, the declared value of "provisions" imported in 1932-33 being £38,680.

VI.—Industry.

Variety of industry in the Gilbert and Ellice Groups is sadly lacking, manufactured mats, hats, fans, and bags being the only articles worthy of note. This work is excellent and is a fine tribute to the ingenuity of the native women. The pandanus palm is extensively used in this connection, but unfortunately there is only a local market and no organized export for these goods.

VII.—Other Economic Activities.

There are no other economic activities.

VIII.—Communications.

A system of moorings has been laid down by the British Phosphate Commissioners at Ocean Island, where ocean-going vessels load, secured to the buoys close inshore in deep water. At Tarawa, Butaritari, and Funafuti Islands there are, for vessels of moderate draught, anchorages in reef-locked lagoons with safe approaches, which are also used occasionally by ocean-going vessels. The majority of the islands in the Colony are surrounded by fringing reefs, steep-to, with only precarious anchorages for small vessels in a few cases.

Communication with the outer world at Ocean Island is moderately frequent, 94 ships having called at Ocean Island between July, 1932, and December, 1933. The majority of ships arrive from and proceed to various ports in Australia and New Zealand, with occasional arrivals from the Far East, United States of America, and European ports. There is a limited amount of irregular external communication with various other ports of the Colony, e.g., Tarawa, Butaritari, Fanning Island, etc. Interinsular communication between the various islands of the Gilbert and Ellice Groups is maintained by vessels engaged in the local copra trade on behalf of Messrs. Burns Philp

and Company, Limited, and Messrs. On Chong and Company, Sydney, and by a small number of native-owned craft. The Colonial Government has a vessel of its own which provides communication between Ocean Island and Tarawa and also keeps in touch with the other Islands. Rough coastal roads are to be found throughout the Colony, their total length being estimated to amount to about 300 miles.

IX.—Tariff.

Import duties are levied on all imports, with the exception of a fairly extensive list of exempted goods, which includes a number of important food-stuffs.

An Imperial Preferential Tariff was introduced in March, 1934, under which goods of Empire origin receive benefits to the extent of one-third of the import duty on certain scheduled articles (mainly wines and spirits, tobacco, cigars, and cigarettes), and one-half on the bulk of all other dutiable imports. The preferential and general rates of duty on the latter class of imports are 12½ per cent. and 25 per cent. *ad valorem* respectively.

The exemption from payment of import duty presently granted in respect of certain articles, irrespective of country of manufacture or origin, is now, under the Imperial Preferential Tariff, granted only when such articles are of British origin.

X.—Trade Representatives.

Nil.

BRITISH SOLOMON ISLANDS PROTECTORATE.

I.—Situation, etc.

The British Solomon Islands Protectorate comprises a double row of mountainous islands lying between latitude 5° and 12° 30' S. and longitude 155° and 170° E. The total area of the islands is approximately 11,458 square miles. A great part of this is practically uninhabited. In Malaita, Ngela, and Savo the population is only about 25 to the square mile and in most of the other islands only between 3 and 6 to the square mile.

The great bulk of land in the Protectorate is native land. This native land may not now be purchased by non-natives; but leases may be obtained through the Government. 185,326 acres are freehold, 45,794 acres are held under Crown Lease, 5,026 acres under Native Lease and 176,037 acres under eight Occupational Licences, of which three are in respect of areas of less than 1,000 acres.

Generally speaking the seasons are well defined by the trade winds. The south-east season lasts from April to November, and the remainder of the year comprises the north-west season. Hurricanes are unknown. There is little variation in the temperature but the south-east season is slightly the cooler. In 1932 the monthly maxima varied from 87° to 91° F. and the monthly minima from 71° to 75° F.

The rainfall is heavy, though it varies considerably from month to month and year to year. The average at Tulagi, the headquarters of the Protectorate, is approximately 120 inches annually.

In 1932 the rainy season, January, February, and March produced 33 inches out of the total rainfall for the year of 128 inches, while 39 inches fell in October, November, and December. In 1933 the rainy season was more marked, January, February, and March producing 52 inches. On the other hand the total rainfall of the year was higher, 167 inches, and the next rainy season began earlier, October, November, and December producing 55 inches.

The ample rainfall is caused by the central backbone of high mountains in the larger islands of the Group which reach in places an elevation of 8,000 feet, but a curious climatological feature is the almost total absence of wet and dry zones on the larger islands. Almost invariably a heavy tropical rain forest or bush, indicative of an ample rainfall, clothes the entire islands. The one exception is on the westerly or driest end of Guadalcanal, where a combination of small rainfall, fires, and appropriate soils has resulted in a series of grass plains and treeless hill slopes.

Owing to the prevalence of malaria the climate must be regarded as unhealthy. The Protectorate is subject to earthquakes from time to time.

II.—Population, etc.

The population of the Protectorate according to the Census of April, 1931, was 94,066, made up as follows:—

Europeans	...	...	...	478	Chinese	...	...	...	164
Melanesians	...	...	...	89,568	Japanese	...	...	...	8
Polynesians	...	...	...	3,847	Malay	...	...	...	1

It is uncertain whether the population is stationary, increasing or decreasing, but it is commonly believed that on the island of Malaita at any rate it is on the decrease.

Apart from a few Asiatic mechanics and tradesmen all labour available in the Protectorate is native. Employment is of two categories, contracted and non-contracted. In 1931 the labour force was approximately 2,000 contract and 1,000 non-contract labourers, these figures being substantially below those of earlier years.

Apart from this form of labour, the native population are occupied principally in cultivating food-stuffs for their own use and gathering coconuts from their own palms for the preparation of copra for sale to traders for export.

III.—Finance.

A.—CURRENCY AND BANKING.

1. The currency in circulation is United Kingdom and Australian coin and local currency notes of four denominations, 5s., 10s., £1, and £5. On the 31st of December, 1933, £4,637 worth of these notes was in circulation. The external exchange value of the currency is the same as Australian, practically all transactions being carried out through Australia.

2. There are no banks in the Protectorate, except a branch of the Commonwealth Savings Bank which conducts Savings Bank business only.

3. The Government conducts no business of a banking nature.

B.—PUBLIC FINANCE.

1. There is no Public Debt.

2.—(a) The financial year commences on the 1st April and the revenue for the year 1932-33 amounted to £58,541.

The estimated revenue for 1934-35 is £58,687.

Analysis of Revenue (on the basis of the Estimates for the year ended 31st March, 1935).

Self-balancing Departments.

Post Office, Telegraph and Telephones—

Revenue	£1,091
Expenditure	£2,027
Net deficit	£936

General Revenue.

	£	Percentage.
Customs (i.e., Import and Export duties)	31,570	57·8
Licences and internal revenue not otherwise classified	13,060	23·9
Rent and royalties	3,026	5·5
Interest	2,290	4·2
Fees of Court, etc.	1,716	3·2
Miscellaneous	2,934	5·3
	54,596	100·0
Revenue of self-balancing Departments set off against		
Expenditure	1,091	
Colonial Development Fund Grant	1,000	
	56,687	

2.—(b) *Analysis of Import duties for 1932-33.**Amount of duty collected on articles imported from:—*

	United Kingdom. £	Rest of Empire. £	Foreign Countries. £	Total. £
Class I.	1,789	5,490	9,678	16,957
Class II.	6	68	147	221
Class III.	1,316	2,709	4,005	8,030
TOTAL	3,111	8,267	13,830	25,208
Parcel Post	—	—	—	101
				25,309

3. The expenditure for the year 1932-33 was £53,423.

The estimated expenditure for 1934-35 is £61,319.

Analysis of Expenditure (on the basis of the Estimates for the year ended 30th June, 1935).

	£	Percentage.
1. Deficit on self-balancing Departments (see 2 (a)) ...	936	1·5
2. Debt charges	—	—
3. Administration	38,010	63·1
4. Economic Development	6,520	10·9
5. Social Services	12,883	21·4
6. Defence	—	—
7. Non-effective (Pensions, etc.)	1,879	3·1
	60,228	100·0
Expenditure of self-balancing departments set-off against Revenue	1,091	
	61,319	

4. The excess of assets over liabilities on 31st March, 1933, was £67,637. Accumulated funds of £77,000 are on a fixed deposit with a bank in Sydney, of which sum £30,000 was earmarked against advances made in London by the Crown Agents for the Colonies.

5. The Protectorate has been given a grant of £5,000 from the Colonial Development Fund towards certain agricultural investigations. The grant is to be spread over a period of five years and the first instalment was paid at the end of 1930. Two entomologists have been appointed who work in co-operation with a local Agricultural Committee.

IV.—Trade Statistics.

EXPORTS.

The countries of destination shown in the trade statistics are Australia, adjacent Pacific Islands (which are included in Australia in the table below and are of negligible importance), Hong Kong, Mexico, and Europe. Exports to the United Kingdom are not shown separately.

(i) *Total Exports (including Bullion and Specie) to:—*

	<i>Australia.</i>	<i>Europe.</i>	<i>Other Countries.</i>	<i>Total.</i>
	£	£	£	£†
1920-21*	220,181	—	116,385	336,546
1930-31*	197,814	90,296	16,200	304,310
1931-32*	123,610	50,194	2,750	176,554
1932-33*	118,076	68,396	—	186,472
1933-34*	78,234	25,739	5,225	109,198

(ii) *Domestic Exports by Classes, 1933-34.*

<i>To</i>	<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
	£	£	£	£	£†
Australia	1,582	76,622	—	30	78,234
Hong Kong	50	2,475	—	—	2,525
<i>Total Empire</i>	1,632	79,097	—	30	80,759
Europe	—	25,739	—	—	25,739
Mexico	—	2,700	—	—	2,700
<i>Total foreign countries</i>	—	28,439	—	—	28,439
GRAND TOTAL	1,632	107,536	—	30	109,198

(iii) *Principal Domestic Exports, 1933-34.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value. £</i>	<i>Principal countries of destination with value in £'000.</i>
<i>Class I.</i>			
Bêche-de-mer	13½ tons	1,632	Australia (1).
<i>Class II.</i>			
Copra	21,119 tons	70,379	Australia (41), Europe (25).
Shell—			
Trocas	467 „	25,210	Australia (24), Hong Kong (1).
Green Snail	171 „	2,113	Australia (2).
Other	3 cwt.	58	Australia (all).
		27,381	
Ivory Nuts	1,085 tons	6,841	Australia (5), Hong Kong (1).
Timber	735,419 s. ft.	2,935	Australia (all).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	<i>Total.</i>
	£	£	£	£†
1920-21*	—	324,745	No records kept.	324,745
1930-31*	29,618	130,375	55,276	215,269
1931-32*	16,619	105,929	34,943	157,491
1932-33*	15,921	114,878	37,462	168,261
1933-34*	18,357	101,508	38,911	158,776

(ii) *Imports by Classes, 1933-34.*

<i>From.</i>	<i>Class I.</i>	<i>Class II.</i>	<i>Class III.</i>	<i>Class IV.</i>	<i>Total Merchandise.</i>
	£	£	£	£	£†
United Kingdom	2,506	93	15,750	8	18,357
Australia	35,747	3,735	32,398	513	72,393
British India	12,186	—	10,605	—	22,791
Rest of Empire	1,702	284	1,243	15	3,244
<i>Total Empire</i>	52,141	4,112	59,996	536	116,785
United States of America	10,008	981	9,866	1	20,856
China	1,891	—	4,178	60	6,129
Borneo	—	—	5,060	—	5,060
Other foreign countries... ..	1,530	55	5,281	—	6,866
<i>Total foreign countries</i>	13,429	1,036	24,385	61	38,911
Parcel Post	—	—	—	810	810
GRAND TOTAL	65,570	5,148	84,381	1,407	156,506

In addition £2,270 of bullion and specie was imported from Australia.

* Year ending 31st March.

† All values in £ Australian; £125 Australian = £100 sterling from 1931 onwards,

(iii) *Principal Imports, 1933-34.*

<i>Article.</i>	<i>Total Quantity.</i>	<i>Total Value.</i>	<i>Principal countries of origin with values in £'000.</i>
<i>Class I.</i>		£	
Rice	1,334 tons	13,509	Burma (6), India (6).
Tobacco (all kinds) ...	—	12,229	United States of America (10).
Meat (all kinds) ...	3,228 cwt.	8,652	Australia (8).
Biscuits	2,910 „	5,279	Australia (5).
<i>Class II.</i>			
Crude Oil... ..	135,427 gal.	3,354	Borneo (2), United States of America (1).
Timber	147,388 sup. ft.	2,731	Australia (1), United States of America (1).
<i>Class III.</i>			
Drapery	—	10,927	United Kingdom (3), Australia (3).
Bags and Sacks ...	32,005 doz.	10,460	India (all).
Machinery (all kinds).	—	9,933	Australia (6), United Kingdom (3).
<i>Oils—</i>			
Kerosene	72,115 gal.	4,248	United States of America (3), Borneo (1).
Motor Spirit	66,848 „	3,759	United States of America (2), Borneo (1).
Lubricating	9,785 „	1,869	United States of America (1).
	148,748 „	9,876	

V.—Natural Resources.

A.

1. AGRICULTURE.

The resources of the Protectorate, so far as they are at present exploited, are mainly agricultural.

Coconuts are the only commercial crop and are at the present time practically the only source of wealth in the Protectorate. The produce is exported in the form of **copra**. The great bulk of this is produced under plantation conditions. In 1933 there were 62,309 acres of coconut plantation. Solomon Islands copra falls under the commercial grades “South Sea Island Sun Dried” and “South Sea Island Hot Air Dried,” but actually none of it is sun dried.

Messrs. Levers Pacific Plantations Proprietary Limited shipped 7,220 tons of hot air dried copra during the year 1933 and, during the same period, Messrs. the Malayta Company, Limited, shipped 164 tons of hot air dried copra and 2,464 tons of smoke dried copra. All the rest is smoke dried and (unlike the output of the companies referred to above which is shipped to Australia for consumption there) is shipped to Europe, where it finds a ready, if poor, market. The industry has been very seriously embarrassed by the low prices of copra which have prevailed recently.

Exports in recent years have been as follows:—

<i>Year.</i>	<i>Quantity.</i>	<i>Value.</i>
	<i>Tons.</i>	£
1929-30	21,300	304,088
1930-31	23,681	271,828
1931-32	21,209	137,843
1932-33	22,256	153,426
1933-34	21,119	70,379

More land is available for coconut plantations than is now so used, but so long as prices continue at their present low level it is unlikely that any further land will be taken up for coconut plantations. Until the first plantations were established some 25 years ago the whole area was covered with virgin bush and owing to lack of experience some plantations were established in areas where the subsoil or climatic conditions were unsuitable. Considerable experience has now been obtained and it is unlikely that previous mistakes would be repeated. It is estimated that at least as much suitable land as is at present under plantations could be made available for new planting.

The limiting factor, however, apart from the question of price, is that of labour supply, and labour would have to be imported from elsewhere under contract, or different arrangements be made for the employment of local native labour, before any large increase of plantations could be effected. At present most native labourers are young men serving on two years contracts. Any substantial increase of labour would be dependent on native villages containing men, women, and children being established on the plantations. To render this possible, however, the plantation owners would have to provide a suitable village-site and buildings and land for gardens.

The only other agricultural export of any significance is the **ivory nut**. The ivory-nut palm is self-sown and is found in almost every swamp in the Protectorate. A small area, estimated at 77 acres in 1933-34, is kept under this palm in various coconut estates in order to ensure a supply of leaf for thatching purposes. The nuts on reaching maturity are gathered by the natives and are sold to traders for export. Exports in recent years have been as follows:—

<i>Season.</i>	<i>Quantity</i>	<i>Value</i>	<i>Season.</i>	<i>Quantity</i>	<i>Value</i>
	<i>in tons.</i>	<i>in £.</i>		<i>in tons.</i>	<i>in £.</i>
1929-30	840	8,232	1932-33	644	4,591
1930-31	724	5,653	1933-34	1,085	6,841
1931-32	1,108	8,818			

Two hundred and twenty acres were under rubber and four acres under cocoa, but there was no export of these commodities during 1933-34.

2. FOREST PRODUCTS.

There is a considerable amount of timber in various parts of the Protectorate, but the only systematic exploitation at present is by a company operating at Vanikoro in the Santa Cruz Group.

Exports in recent years have been as follows:—

Season.		Quantity in super. feet		Value in £.
1929-30	...	1,932,107	...	9,276
1930-31	...	786,639	...	4,683
1931-32	...	1,098,340	...	4,943
1932-33	...	1,244,134	...	5,903
1933-34	...	735,419	...	2,935

3. ANIMAL HUSBANDRY.

Most plantations are stocked with cattle, partly for food purposes, but mainly to keep down grass and weed growth on cultivated areas.

It was estimated on the 31st of March, 1934, that the Protectorate contained 16,015 cattle, 544 goats, 480 pigs, 235 horses, 87 sheep, and 48 mules.

4. MINERALS.

No mineral resources are at present being exploited.

5. FISHERIES AND MARINE PRODUCTS.

Trocas shell (*Trochus niloticus*) and **green snail shell** (*Turio marmoratus*) is fished for by the natives and sold to traders. **Bêche-de-mer** is gathered by a few Japanese under contract to a company trading in the Protectorate and is exported by the Company.

There are also trifling exports of turtle.

Exports in recent years have been as follows:—

Season.	<i>Trocas shell.</i>		<i>Bêche de Mer.</i>		<i>Green Snail Shell.</i>	
	Quantity. in tons.	Value in £.	Quantity in tons.	Value in £.	Quantity in tons.	Value in £.
1929-30	450	26,325	4	520	114	2,411
1930-31	294	13,332	21	2,457	106	1,909
1931-32	462	19,103	15	1,400	93	1,412
1932-33	400	19,036	19	2,135	91	1,248
1933-34	467	25,210	13	1,632	171	2,113

B.

FOOD SUPPLY.

So far as the native population (apart from plantation labour) is concerned, the Protectorate is self-supporting, garden crops of such food-stuffs as yams, sweet potatoes, panna, bananas, and other vegetables being grown and coconuts being gathered as required. Food-stuffs are not in general grown for sale.

The food-stuffs required by Europeans are largely imported and there are substantial imports of provisions for distribution to the labour force, who receive rations from their employers. The principal food-stuffs imported in 1933-34 were:—

	Tons.	£
Rice	1,334	13,509
Meats, preserved	136½	7,561
Biscuits	145½	5,294

Under present conditions it is impossible to feed the plantation labourers from local resources. The bulkiness and perishability of native food-stuffs would make it prohibitively expensive to bring such supplies from present places of production to the plantations. The situation would be altered if native villages were established on the plantations, as in that case the women could take care of the gardens which would supply the bulk of the food-stuffs required.

VI.—Industry.

There is no industry of any significance in the Protectorate, other than the preparation of copra for export—see above.

VII.—Other Economic Activities.

Nil.

VIII.—Communications.

There are no railways in the Protectorate. Native villages are linked up by paths and tracks varying in quality. Satisfactory motor roads have been built on many plantations for the internal movement of produce.

Inter-island and inter-port communication is maintained by the regular mail steamers referred to below, by three vessels owned respectively by Messrs. Burns, Philp and Company, Messrs. Lever's Pacific Plantations, Limited, and Messrs. W. R. Carpenter (Solomon Islands), Limited, and occasionally by auxiliary vessels owned by planters and traders.

Communication with the outer world is maintained by Messrs. Burns, Philp and Company's mail steamers which ply between the Protectorate and Australia at six weeks' intervals.

Direct overseas shipments are also made occasionally in other vessels both British and foreign.

In 1933-34, 60 steam vessels (50 British and 10 foreign) of an aggregate tonnage of 61,501 tons entered at ports of the Protectorate.

The chief port in the Protectorate is Tulagi; the other ports of entry are Gizo and Shortland Harbour.

Vessels of any size can with safety enter Tulagi Harbour, but only ships of approximately 5,000 tons could tie up alongside the Government wooden wharf at Tulagi or Messrs. Burns Philp's concrete wharf at Makambo (opposite Tulagi and half a mile across the harbour) or at Messrs. Lever's Pacific Plantations, Limited, concrete wharf at Gavutu three miles from Tulagi.

IX.—Tariff.

Import Duties are charged on all goods at specific or *ad valorem* rates, other than a number of articles which are specifically exempted from duty.

In the case of all dutiable articles, except oils, imports of Empire origin receive a preference, the margin below the general rate of duty generally being 12½ per cent *ad valorem*.

X.—Trade Representatives.

Nil.

TONGA.

I.—Situation, etc.

The Kingdom of Tonga consists of three main groups of islands and three outlying islands in the Southern Pacific, the main groups lying between latitude 18° and 22° S. and longitude 173° and 176° W.

The total area of the islands is approximately 250 square miles.

The climate is good for the tropics from May to November, the temperature rarely rising above 80° and the humidity being relatively low. During the wet season, from December to April, the temperature rarely rises above 90°, but the humidity is high and conditions therefore trying for Europeans.

The average rainfall at Nukualofa during the years 1926-1933 (inclusive) was 61.96 inches. The total rainfall in 1933 was 56.46 inches. Rain fell on 171 days during the year, the most rain in any 24-hour period being 6.51 inches in December. The country is subject to drought and in 1930 the total rainfall amounted only to 40.5 inches.

The land system of the Kingdom is interesting and peculiar. Each adult male Tongan is entitled to a "tax allotment" of 8½ acres of agricultural land subject to the obligation to plant one-half of it in coconuts. No Tongan may hold two tax allotments, but he may obtain the lease of an extra area. European settlement is not encouraged. The number of European leases in Tonga is 1,634, of a total area of 7,422 acres. The majority of the leases, apart from residences in towns, consist of store sites and the small trading stations of the large commercial houses.

II.—Population.

The total population at the census taken in April, 1933, was 30,693; including 29,620 Tongans, 409 Europeans, 436 half-castes, 185 other Pacific Islanders, and 43 others. The increase in the Tongan population during the ten years ending April, 1933, was 20.87 per cent. The increase during the year ending April, 1933, was 4.36 per cent.

Most of the Tongan population is occupied in the cultivation of the "tax allotments" referred to above. Very few Tongans engage regularly in paid labour. The number of labourers employed by Europeans, apart from casual labour, is negligible and consists chiefly of Fijians and Solomon Islanders.

Immigration is limited. The immigrant population is mainly composed of employees and labourers in mercantile firms. Emigration among the Tongan people may be said not to exist.

III.—Finance.

A. CURRENCY AND BANKING.

1. United Kingdom and Australian coins are legal tender. There is a local issue of currency notes, notes to the value of £21,268 being in circulation on the 31st December, 1933. The external exchange value of the currency note is approximately the same as Australian.

2. A Government Savings Bank was established in 1926. The number of depositors on the 31st December, 1933, was 961, and the total amount on deposit was £25,951. There is no other bank in the Protectorate.

B. PUBLIC FINANCE.

1. There is no public debt.

2.—(a) The financial year closes on the 30th of June.

The revenue for the year 1932-33 amounted to £64,072.

The estimated revenue for 1933-34 is £62,735.

*Analysis of Revenue (on the basis of the Estimates for the year ended 30th June, 1934).**Self-balancing Departments.*

Post Office, Telegraphs, and Telephones—

Revenue	...	...	...	...	...	...	...	...	£1,880
Expenditure	...	...	...	...	...	...	...	...	£2,341
Net deficit									£461

General Revenue.

	£	Percentage.
Native Taxes	11,500	18·9
Customs (i.e., Import and Export Duties)	25,000	41·1
Port and Wharfage Dues	2,710	4·4
Licences and internal revenue not otherwise classified	6,280	10·3
Rents and Interest	8,130	13·4
Fees of Court, etc.	6,765	11·1
Miscellaneous	470	0·8
	60,855	100·0
Revenue of self-balancing Departments set-off against		
Expenditure	1,880	
	62,735	

2.—(b) Analysis of Import Duties for 1933.

	Total. £
Class I	7,522
Class II	368
Class III	6,439
	14,329

3. The expenditure for the year 1932-33 was £60,347.

The estimated expenditure for 1933-34 is £68,583.

Analysis of Expenditure (on the basis of the Estimates for the year ended 30th June, 1934).

	£	Percentage.
1. Deficit on self-balancing Department	461	0·7
2. Debt charges...	—	—
3. Administration	35,869	53·7
4. Economic Development	6,897	10·4
5. Social Services	19,426	29·2
6. Defence	—	—
7. Non-effective (Pensions, etc.)	4,050	6·0
	66,703	100·0
Expenditure of self-balancing Departments set-off against		
Revenue	1,880	
	68,583	

4. On the 30th June, 1933, the surplus funds of the Kingdom amounted to £137,458, including a sum of £80,100 on Fixed Deposit in Australia and £13,500 on Fixed Deposit in New Zealand.

5. No grants-in-aid have been received or requested.

IV.—Trade Statistics.

Only comparatively simple trade statistics are collected and it is not possible to give all the particulars which are available for other dependencies.

Re-exports are not distinguished from exports of domestic produce. In the tables given below only " sundries " are shown as re-exports.

(Note.—Figures for 1912 have been inserted as representing the pre-war position because in 1913 the country was suffering severely from the effects of hurricane.)

EXPORTS.*(i) Total Exports (including Bullion and Specie).*

	£		£
1912	216,512	1931	90,596
1930	183,204	1932	98,163
		1933	114,447

(ii) *Destination of Exports, 1933.*

	£
Europe	102,219*
America	2,821
New Zealand	3,977
Other countries	132
	109,149
Specie	4,500
Re-exports	798
	114,447

(iii) *Principal Exports, 1933.*

Article.	Quantity.	Value. £	Destination of exports with value in £'000.
Copra	11,379 tons	105,029	Europe (99), America (3).
Bananas	16,777 cases	3,700	New Zealand (all).

IMPORTS.

(i) *Total Imports (including Bullion and Specie) from:—*

	United Kingdom.	Rest of Empire.	Foreign Countries.	Grand Total.
	£	£	£	£
1912	3,499	140,754	25,270	189,473
1930	29,708	100,970	17,628	148,306
1931	9,309	62,234	9,627	81,170
1932	10,495	63,613	11,898	86,006
1933	11,156	54,750	20,102	86,008

(ii) *Origin of Imports, 1933.*

(Note.—The countries here shown are countries of consignment, which are not necessarily identical with the true countries of origin of the goods in question.)

Country of Consignment.	Value in £
United Kingdom	11,156
Australia	24,411
New Zealand	22,343
Fiji	6,734
Other Empire countries	1,252
<i>Total Empire</i>	65,906
United States of America	10,173
Japan	9,528
Other foreign countries... ..	401
<i>Total foreign countries</i>	20,102
GRAND TOTAL	86,008

(iii) *Principal Imports, 1933.*

(Note.—Countries of origin and quantities are not shown in the published statistics.

	£	Origin where known.
Drapery... ..	15,346	United Kingdom and Japan.
Meats	9,369	New Zealand and Australia.
Bags	7,077	India.
Flour	5,596	Australia.
Kerosene Oil	3,704	United States of America.
Benzine	3,441	United States of America.
Hardware	2,802	Mainly United Kingdom.
Timber	2,774	—
Sugar	2,548	New Zealand and Australia.
Tobacco... ..	2,111	Mainly Australia.
Soap	1,676	Fiji and Australia.

The quantity of goods of United Kingdom origin is greater than the statistics indicate as certain imports from New Zealand and Australia are United Kingdom goods re-consigned. The same applies to goods of Japanese origin. The principal imports from the United Kingdom are drapery and hardware. During the year there was a considerable importation of cheap Japanese drapery. Timber importations were negligible during the year and the tendency of the Tongans to substitute wooden houses for thatched cottages has been checked by economic depression.

* Includes £3,300 value of copra, the destination of which is not shewn in Trade Returns. A small amount may have been sent to America.

The leading commercial houses, Messrs. Burns, Philp (South Seas) Company, Limited, and Messrs. Morris Hedstrom, Limited, import goods from the United Kingdom through their London offices.

V.—Natural Resources, etc.

A.

1. AGRICULTURE.

The soil throughout the Group is very fertile and the potential productivity of the Kingdom is considerably in excess of the actual; actual production is confined to a few staples, and of these only two, copra and bananas, are at present produced for export.

European settlement is not encouraged, and, apart from this fact, the difficulty of obtaining labour would form an effective bar to the development of the land by plantation methods. There are, therefore, only a few European planters in the Kingdom, and over 90 per cent. of the copra exported is produced by the Tongans themselves.

Every Tongan taxpayer is compelled by law to plant one-half of his tax-allotment with coconuts properly spaced and planted in rows. Legislation exists having as its object the improvement of the quality of copra produced and it is an offence for a trader to have in his possession bad or damaged copra.

The total exports of copra in recent years have been as follows:—

				Quantity in tons.	Value in £
1929	...	...	...	16,861	252,911
1930	...	...	...	14,134	169,610
1931	...	...	...	8,929	80,361
1932	...	...	...	8,323	83,228
1933	...	...	...	11,379	105,029

The diminution in exports in 1931 and 1932 was due to the cumulative effects of hurricanes and droughts which, during the years 1929 to 1932 affected the various islands in the Group. In addition to these natural causes the disastrous fall in price had a tendency to discourage production. Copra is produced by Tongans on every island in the Group. It falls under the commercial grade "South Sea Island Sun Dried." The commodity is purchased by the exporting firms either direct from the Tongans or from small traders. The principal exporters are Messrs. Lever Bros., Ltd., Messrs. Morris Hedstrom, Ltd., and Messrs. Burns Philp (South Sea) Company, Ltd. It is exported on optional bills of lading and is mostly sold on the Continent.

Prior to 1914 there was a considerable export of bananas to New Zealand, but this trade was destroyed during the war owing to the lack of steamship communications. The trade was revived in 1931 and a small shipment of 2,191 cases was exported in December of that year. During the year 1932 exports amounted to 47,659 cases, say about 1,750 tons, valued at £10,452. In 1932 an arrangement was concluded with His Majesty's Government in New Zealand allotting a quota share of the Dominion banana market to Fiji and Tonga. The combined quota for the two Administrations for 1933 was fixed at 12,000 cases a month from May to September and 15,000 cases a month from October to April. The Tongan share of the quota was subsequently fixed at 20 per cent. of the total Fiji-Tonga quota and Tonga commenced shipments on this basis in January, 1933.

A cyclonic storm at the end of February, 1933, seriously affected the banana crop. The result was that export was not possible from March until the last quarter of the year. Only 16,777 cases, valued at £3,700, were exported during 1933.

2. FOREST PRODUCTS.

There are no forests.

3. ANIMAL HUSBANDRY.

The returns for 1933 show the following live-stock in Tonga:—Cattle, 2,041; pigs, 19,583; goats, 3,144. The cattle are mostly owned by Europeans and the market is local. The export of cattle is not possible in present circumstances. The Tongans have hitherto been averse from keeping cows; the younger generation, however, are becoming alive to the benefits of using fresh milk.

Pigs are used by the Tongans for food purposes, but are generally of a poor type and would not command a market for export. Boars are occasionally introduced from New Zealand, but in-breeding is prevalent.

The pasturage is good but there are no rivers or streams.

4. MINERALS.

There are no known minerals of commercial value in the Kingdom.

5. FISHERIES.

Nil.

B.

FOOD SUPPLY.

There is an ample supply of native food-stuffs, root crops in abundant quantity being produced for domestic use as well as coconuts.

European vegetables of most summer varieties are easily grown except during the months December to April.

The abundance of pigs, fish, and fowl renders the islands self-supporting in times of necessity, but the Tongan, especially the older generation, prefers tinned to fresh meat, and meat imports, mainly from New Zealand, average £18,777 for the five years ending the 31st December, 1932. In 1933 the value of imported meats was £9,369.

In the outlying islands fresh meat and ice are not available.

There are substantial imports of flour and sugar, and some imports of biscuits, the value of imports being as follows:—

			Average for 5 years ending 31st December, 1931.	1932.	1933.
			£	£	£
Flour	...	...	10,923	4,990	5,595
Sugar	...	...	4,812	2,392	2,548
Biscuits	...	...	3,170	1,011	1,079

The fall in the value of food-stuffs imported is altogether inter-related with the poor copra crop and the fall in copra prices.

Imports of alcoholic liquors are relatively very inconsiderable.

VI.—Industry.

There is no industrial development.

VII.—Other Economic Activities.

Tourist traffic and entrepôt trade play no part in the economic life of the Kingdom.

VIII.—Communications.

There are approximately 40 miles of metalled roads in Tongatabu and 14 miles in Vavau suitable for motor traffic. The remaining roads in the Protectorate are graded earth roads, unsuitable for heavy traffic in the wet season. There are no railways.

Inter-insular communication is maintained by a Tongan Government despatch vessel, a small auxiliary ship fitted with semi-diesel engines.

Communication with the outside world is provided by cargo steamers of the Union Steam Ship Company of New Zealand. Trans-Pacific freighters call at irregular intervals on the voyage from Canadian Ports to New Zealand and calls are also made at irregular intervals by the cargo vessel of the Company which maintains a monthly service between New Zealand and Fiji. Vessels under charter to copra exporters call for copra cargoes at intervals of approximately two months.

In 1933 the total number of vessels entered was 32 of which 27 were steam and motor vessels (17 British, 6 Swedish, 1 United States, and 3 Panamanian) of a total tonnage of 54,865 tons.

There are two ports of entry, Nukualofa and Vavau. At both these ports there are concrete wharfs, 200 feet long by 40 feet wide, suitable for discharging cargo. At Nukualofa Wharf the maximum available depth of water L.W.O.S.T. is 22 feet; at Vavau 21 feet. At both Nukualofa and Vavau vessels of a draft up to 25 feet can be moored by keeping the stern off the wharf. Buoys are provided for this purpose. Safe anchorage is available for vessels of large tonnage at either port. Nukualofa harbour is reef bound; Vavau is land locked.

IX.—Customs Tariff.

Import duties are levied on all goods with certain specified exemptions. Specific rates are applied to a few articles (principally alcoholic liquor, tobacco, sugar, and flour) and *ad valorem* rates to the rest. In the case of dutiable articles, except benzine and kerosene, imports of Empire origin receive a preference. The general tariff is 20 per cent. *ad valorem*; the preferential rate is 12½ per cent. On articles subject to specific duties the preferential rate varies from one-half to four-fifths of the general rate.

X.—Trade Representatives.

Nil.

NEW HEBRIDES.

(British-French Condominium.)

I.—Situation, etc.

The islands comprising the New Hebrides lie between latitude 13° and 21° S. and longitude 166° and 170° E. Including the Banks and Torres groups which lie somewhat to the north of the main group there are in all 11 large and about 80 small islands. The total area of the whole group is about 5,700 square miles of which Santo, the largest island, accounts for about 1,500.

The capital of the Condominium is at Vila in Efate, five to six days by steamer from Sydney, New South Wales.

The Group is administered jointly by the United Kingdom and French Governments, whose local representatives are the two Resident Commissioners who are responsible to High Commissioners at Suva, Fiji, and at Nouméa, New Caledonia, respectively.

Owing to the status of the Group as a condominium, the produce of the Group is not granted the benefits of Empire preference in the United Kingdom or the same treatment as the French colonies receive in France, but certain articles, notably copra, produced by French planters receive on importation into France the same tariff treatment as that accorded to French Colonial products.

The larger islands are very mountainous and there are three active volcanoes in the Group.

The climate of the Group is very enervating and on the whole unhealthy. There is a hot wet season from November to April and a dry cool season from May to October, but this distinction seems to have become less marked in recent years and there are now droughts in the wet season and heavy rains in the dry season.

The temperature at Efate varies from a minimum of about 63° F. in the dry season to a maximum of about 89° F. in the wet season. The temperature of the northern islands is usually some 7 degrees above that of the southern islands (including Efate).

During 1933 rain was almost continuous throughout the year and amounted to some 40 or 50 per cent. above the average. The average rainfall varies considerably in different parts of the Group, as the following table shows:—

								<i>Average inches.</i>
Dillon's Bay (Erromanga)	...	...	...	...	...	...	...	57·32
Vila (Efate)...	...	...	...	...	...	...	...	70·97
Hog Harbour (E. Santo)...	...	...	...	...	...	...	...	127·73
Port Patterson (Vanua Lava)	...	...	...	...	...	...	...	133·04

The Group is not infrequently visited by hurricanes.

Land held by settlers in the New Hebrides has been largely acquired from native owners by purchase or barter. The native deeds do not constitute an indefeasible title until confirmed by the Joint Court.

Approximately 1,000 claims covering about 2,150,000 acres, i.e., 3,360 square miles or nearly two-thirds of the total area of the Group, have been lodged in the Joint Court. Two hundred and thirteen indefeasible titles had been granted by the end of 1933 in completing the land work on Efate and adjacent islands.

In the grant of land titles due consideration is given to the needs of the native population, and, when necessary, reserves are set aside for them.

Large tracts of fertile land remain untouched, awaiting more favourable times and security of tenure.

II.—Population, etc.

No census of the native population has ever been made and the native population cannot be more closely estimated than at between 40,000 and 60,000. The non-native population at the end of April, 1934, was 2,318, including 180 British, 789 French, 1,228 French protected persons (mostly Tonkinese), 60 foreigners who have opted for the British legal system, and 61 foreigners who have opted for the French legal system.

The following is an approximate estimate of the population of the more thickly populated islands:—

Malekula	...	...	9,000	Ambrym	...	...	4,000
Santo	...	...	7,000	Banks and Torres Group	...	...	3,000
Pentecost	...	...	7,000	Epi	...	...	2,500
Tanna	...	...	6,500	Efate	...	...	2,000
Aoba	...	...	6,000				

The natives are Melanesian, but in places there is a mixture of Polynesian blood.

In general the native population has been declining but in recent years the population on certain islands has shown a tendency to increase particularly on the islands of Tanna and Tongoa.

Generally speaking the native of the New Hebrides will not work for wages unless compelled by circumstances. When times are good labour is very scarce and dear, as most natives can obtain all they want by the sale of the produce of their lands and with a minimum of exertion. When times are bad, as they now are, the time comes when the native has exhausted his savings and is compelled either to work on his own account, or to content himself with the local supplies of food, which are ample, and clothing, or to work for wages to secure the imported food, clothing, and other small luxuries to which he has become accustomed.

When the third alternative is chosen the production of native-made copra tends to fall away.

Native labour falls into three main classes:—

- (a) Plantation labour, small boats' crews, traders' employees, and Government servants, on contract or otherwise;
- (b) domestic labour; and
- (c) casual manual labour.

The native will seldom accept long-term contracts and domestic labour is always difficult to get.

Asiatic labour falls into two classes:—

- (a) Indo-Chinese contract labour imported for the use of French settlers by the French Government. Owing to the depression this force was reduced from about 5,500 at the end of 1930 to about 1,166 at the end of 1933; and
- (b) free Chinese and Japanese artisan labour.

III.—Finance.

A.—CURRENCY AND BANKING.

1. Both sterling and French currency are legal tender and Australian currency is also largely used.

2. There are no banks in the New Hebrides. The Condominium Government carries out its banking operations through Nouméa (New Caledonia) and Sydney (New South Wales). It was the custom of the larger British and French commercial houses to act as bankers for their clients, but the economic crisis, coupled with shortage of cash and credit, has severely restricted local banking operations.

3. The Condominium Government does not perform any functions of a banking nature.

B.—PUBLIC FINANCE.

1. By Article 5 of the Convention of 6th August, 1914, each of the two Signatory Powers is required to defray the cost of its own Administration in the Group, that is the emoluments of, and other expenses connected with the national staff, Police Force and District Agents. The expenditure on British Services amounted to £8,651 in 1933-34. The estimated expenditure for 1934-35 is £9,941.

The cost of the joint services, including finance, posts and telegraphs, customs, public works, ports and harbours, public health, the Joint Court and Summary Courts and land registry, is defrayed out of local taxation. If revenue from local taxation is insufficient to meet jointly approved expenditure, the two Powers contribute to the deficit in equal proportions.

No such contributions were required between 1922 and 1930 inclusive, but contributions were required in 1931 and later years. During 1933 the Condominium revenue amounted to £11,126,* and the Condominium expenditure to 19,019,* leaving a deficit of £7,893.*

IV.—Trade Statistics.

Only comparatively simple trade returns are kept and full information regarding countries of destination of exports and countries of origin of imports is not available.

EXPORTS.

(i) *Total exports with values in sterling (converted from francs at the rate of £1 = 124 francs) and quantities in tons.*

			£	Tons.			£	Tons.
1929	...	...	286,232	15,159	1932	...	78,601	10,014
1930	...	...	250,520	16,460	1933	...	71,839	10,043
1931	...	...	122,193	13,667				

(ii) *Principal exports, 1933.*

			Quantity in tons.	Value in £.			Quantity in tons.	Value in £.
Cocoa	...	...	1,893	28,745	Trochas and Burghaus shell	...	110	1,782
Copra	...	...	7,045	23,864	Cotton, ginned	...	62	1,084
Coffee	...	...	433	13,937	Sandalwood	...	61	1,084

The share of produce exported by British firms and planters was 26 per cent. by weight and 14 per cent. by value of total exports, as against 45 per cent. and 27 per cent. in the previous year. Copra is the principal British export.

IMPORTS.

(i) *Total imports with values in sterling (converted from francs at the rate of £1 = 124 francs).*

			£				£
1929	...	...	300,035	1932	...	...	81,587
1930	...	...	157,541	1933	...	...	85,544
1931	...	...	79,997				

(ii) *Principal imports, 1933, values in sterling.*

Class I.				Class III.			
			£				£
Tobacco	...	...	5,140	Tinned fish	...	...	1,850
Rice	...	...	4,467	Spirits (potable)	...	...	1,590
			£	Tinned goods and groceries	...	...	1,508
Wines (fine)	...	...	1,000	Sugar	...	...	1,259
(ordinary)	...	...	2,817	Beer	...	...	1,240
			3,817	Tea	...	...	1,190
Flour	...	...	2,143	Tinned milk	...	...	943
			£				£
Oils—				Building materials...	...	...	5,701
Petrol	...	...	3,741	Gunny bags	...	...	4,166
Kerosene	...	...	3,329	Agricultural machinery, boats and			
Lubricating	...	...	1,606	motor cars	...	...	2,189
			8,676				

Australia is now the chief source of supply of a number of commodities, including flour, beer, fine cigarettes and tobacco, tinned meat and fish, potatoes, butter, tinned milk, ship's biscuit, sugar, groceries, piece-goods, soap, onions, haberdashery and apparel, some of which formerly came almost exclusively from France.

V.—Natural Resources.

A.

1. AGRICULTURE.

The soil and climate of the Group are well suited to the production of most tropical crops.

Almost the whole cultivation is in the hands of European settlers, the only commodity produced for export by the natives on their own account being copra, about one-sixth of the total exports of which are of native production.

* These figures include conversions from francs at the rate of 124 francs to the £.

Of the European-owned plantations some are worked by individual settlers, both British and French, and the remainder by French Companies, the most important being the Société Française des Nouvelles-Hébrides.

The British settlers work their estates with indigenous native labour, about one-third under contract and the remainder free or casual. During the prosperous period 1924 to 1929, the French settlers depended to a large extent on indentured Tonkinese coolies imported by the French authorities. Owing, however, to the general depression in primary products the French settler has latterly been unable to meet the cost of the introduction and employment of Tonkinese labour, and in consequence has been forced to repatriate numbers of them before the expiry of their contracts. The cheaper indigenous labour is now being resorted to.

The most important item is **copra**, which is classed as South Sea Island, smoke dried; the production during recent years has been as follows:—

Quantity in Value in				Quantity in Value in			
		tons.	£*			tons.	£*
1929	...	10,787	147,460	1932	...	7,032	36,306
1930	...	11,883	130,573	1933	...	7,045	23,864
1931	...	10,005	69,886				

For the time being the natives have almost abandoned copra making and work on European-owned plantations has been cut down to the minimum with some consequent reduction in crops. On certain islands, however, an improvement in the output of native-owned copra has been remarked, particularly from the island of Tanna.

The next most important commodity is **cocoa**, of which the varieties known as Criollo and Calabacillo are grown. Production during recent years has been as follows:—

Quantity in Value in				Quantity in Value in			
		tons.	£*			tons.	£*
1929	...	2,047	89,088	1932	...	1,728	27,967
1930	...	2,265	73,444	1933	...	1,893	28,745
1931	...	1,505	31,435				

The fall in production in 1932 was due to the general depression.

There is some cultivation of **cotton** and the following products have been exported:—

				Ginned Cotton.		Cotton seed.	
				Tons.	£*	Tons.	£*
1929	...	...	...	329	31,700	657	1,210
1930	...	...	...	480	26,880	476	591
1931	...	...	...	387	9,833	1,063	1,286
1932	...	...	...	189	3,277	411	497
1933	...	...	...	62	1,084	126	121

There are two varieties of cotton grown, the Caledonian and Caravonica. The former is now more favoured on account of its weather resisting properties. Owing to the fall in price substantial areas of cotton were abandoned in 1931 and subsequent years.

The following products are also exported:—

				Coffee.		Maize.	
				Tons.	£*	Tons.	£*
1929	...	...	...	100	6,530	482	4,355
1930	...	...	...	125	7,892	455	3,670
1931	...	...	...	131	5,712	52	298
1932	...	...	...	213	6,571	99	400
1933	...	...	...	433	13,937	35	143

The **coffee** grown in the Group is of excellent quality and holds its own in the world's markets. The variety most favoured is the *Robusta* on account of its immunity from the devastating yellow leaf disease (*Hemileia vastatrix*). In former years the *Arabica* variety was almost entirely grown but the plantations were totally destroyed by the disease above mentioned.

More interest is being shown in the cultivation of coffee, and owing to the bounty on its production offered to French settlers by the French Government, the output increased substantially in 1933 and may continue to increase further in the near future.

Owing to the great fall in prices of the main staples, endeavours were made in 1930 and the following years to find alternative and more remunerative crops. Other commodities to which attention has been paid are castor seed and tung oil and tobacco (the latter under French auspices) which have not yet reached the export stage.

Exports of castor seed commenced in 1931, when 21 tons, valued at £121,* were exported. Exports were 4 tons, valued at £22* in 1932, and 52 tons, valued at £172,* in 1933.

Bananas, oranges, pineapples, tomatoes, and practically all kinds of tropical fruits, grow profusely. An attempt was recently made to organize the export of bananas, tomatoes, oranges, etc., to New Zealand, but owing to transport difficulties the scheme had to be abandoned.

2. FOREST PRODUCTS.

There are small quantities of timber, particularly kauri, island teak, and other useful hardwoods in the Group, but, apart from difficulties of financing and marketing, it is doubtful whether these timbers are in sufficient quantity to support an industry. There is, however, some export of **sandalwood**, the quantities exported in recent years having been as follows:—

		Tons.	£*			Tons.	£*
1929	...	49	957	1932	...	69	1,146
1930	...	98	1,978	1933	...	61	941
1931	...	24	492				

* Conversions from francs are made at the rate of 124 francs to the £.

3. ANIMAL HUSBANDRY.

There is a small sheep station on Erromanga carrying about 3,000 sheep, and a cattle station of about 1,000 head.

Cattle thrive well and are bred on a small scale generally throughout the Group principally for slaughter to provide food for the labour force, and also in order to keep down grass and undergrowth on the plantations.

There has been a small but steady export of wool:—

		Tons.	£*			Tons.	£*
1929	...	8	963	1932	...	4	170
1930	...	16	1,257	1933	...	9	436
1931	...	9	412				

Hides, a by-product of the cattle industry, are exported to Australia. In 1933 21 tons valued at £172* were exported.

4. MINERALS.

Traces of various minerals are known to exist including deposits of coal and manganese. There are large quantities of sulphur on the islands of Tanna, and Vanua Lava (Banks Group).

5. FISHERIES AND MARINE PRODUCTS.

There is no fishing industry. There is some gathering of trocas and green-snail shell for export, the latter being called *burghaus* shell in the local returns. The quantities of the two shells are shown together in the returns, exports during recent years having been as follows:—

		Tons.	£*			Tons.	£*
1929	...	57	2,980	1932	...	112	1,768
1930	...	55	2,721	1933	...	110	1,782
1931	...	102	2,053				

Bêche-de-mer appeared as a separate item for the first time in the returns for 1931, the amounts exported being as follows:—

Year.		Quantity. Tons.	Value. £*
1931	...	9	104
1932	...	1	13
1933	...	18	236

B.

FOOD SUPPLY.

So far as native foodstuffs are concerned there are ample supplies available and in case of necessity the native population could be self-supporting. The European population, however, is dependent on imports and the natives have been accustomed to various imported luxuries with which they would not willingly dispense.

The principal items of imported foodstuffs are shown in IV above; the principal source of supply is Australia.

VI.—Industry.

There is no industrial activity of any kind in the Group, apart from the performance of the simplest processes in order to prepare local products for export.

VII.—Other Economic Activities.

There is no entrepôt trade and no facilities for tourist traffic.

VIII.—Communications.

Tanna has several roads, one of which traverses the island. There is a fairly good road on Tongoa. Vila has several fair roads which link up with the districts adjacent to the town. In the other islands there are few public roads suitable for wheeled transport. In addition to these public roads there are a number of roads suitable for motor transport traffic on the European-owned estates.

There are no railways in the Group. A rail track, two-foot gauge, four miles long, runs from Vila to the outskirts of Mélé but is seldom used. Small lengths of similar rail tracks are used on a few plantations in the Group for the purpose of transporting produce.

Inter-island communications are provided by the s.s. *Makambo* (Burns, Philp (South Sea) Company) and s.s. *Bucephale* (Messageries Maritimes) which make monthly or five-weekly voyages round the Group without fixed itinerary, but usually connecting with mail steamers at Vila. In addition there is a French general trading steamer, the *Pervenche*, of 200 tons with no fixed itinerary.

Communication with the outer world is provided by several regular steamship services.

A two-monthly service of the Messageries Maritimes between Dunkirk and New Caledonia via Panama touches at Vila on both the outward and the return voyages, the time taken from Vila to Marseilles being approximately 65 days.

A Burns Philp and a Messageries Maritimes steamer maintain five-weekly services between Vila and Sydney (New South Wales).

A vessel of the Dutch Royal Packet Navigation Company maintains a regular service between Saigon and Nouméa touching at Vila every two and a-half months.

* Conversions from francs are made at the rate of 124 francs to the £.

Vila is the port of entry of the Group. The following vessels were entered in 1933:—

						<i>Vessels.</i>	<i>Net tons.</i>
British	...	...	...	...	...	14	34,615
French	...	...	...	...	...	37	102,922
Other	...	...	...	...	...	9	21,269

Mails are usually sent by the Australian route, the average period for transmission from Vila to England being between 42 and 49 days.

There are four good harbours, Vila and Havannah on Efate and Port Sandwich and Port Stanley on Malekula, and a number of sheltered anchorage off these and other islands. Vessels up to 20,000 tons can enter Vila Harbour and there is anchorage for several vessels of large tonnage. Accommodation could be increased if there were moorings. There are no wharves or piers suitable for embarking or discharging cargo except for very small vessels. Unloading is carried out by lighters and cargo is discharged at the jetties along the beach front. There are four small jetties or piers.

IX.—Tariff.

Import duties are levied on all goods except those specially exempted (among which are flour, rice and coal). Specific rates are charged on a few articles and *ad valorem* rates on the rest, with a general rate of 6 per cent. on all goods not specially enumerated or exempted. Owing to the status of the Group, there is no Imperial preference.

X.—Trade Representatives.

Nil.

A SUMMARY OF SOME SIGNIFICANT FIGURES.

The table immediately following is designed to give a conspectus of the most significant statistical figures relating to the Colonial Empire.

The following points should be noted:—

Column II. Area.—The area of the Dependencies of the Falkland Islands which are practically uninhabited has been excluded, since its inclusion would be definitely misleading.

Column V. Public Debt.—The amounts shown are net amounts, that is the total Public Debt less the value of the Sinking Fund, at the dates shown.

Columns VI and VII. Revenue and Expenditure.—The amounts shown are the *net* Revenue and Expenditure, that is, they include only the surplus or deficit, as the case may be, of the self-balancing Departments and not the gross Revenue and Expenditure of those Departments.

Column VIII. Imports.—The figures shown are those of *total* imports. It is not possible to isolate the imports for domestic consumption. In the case of those few Dependencies, therefore, such as the Straits Settlements and Hong Kong, which enjoy a substantial entrepôt trade, the figure of amount of imports per head is misleading. No statistics are available for Perlis and Gibraltar.

Column IX. Domestic Exports.—The figures shown are those of domestic exports only, which are of more significance than those of *total* exports. No statistics are available for Perlis, Gibraltar, and Hong Kong, although figures of total exports are available for the latter Colony.

Column X. Total Exports.—The value of trade per head is not included in this Column, since the figures would be misleading in some cases and almost identical with the figures in the preceding Column in others.

STATEMENT SHOWING GENERAL STATISTICS RELATING TO THE COLONIAL EMPIRE.

<i>Colony, etc.</i>	<i>Area in square miles.</i>	<i>Population.</i>	<i>Density of population per square mile.</i>	<i>Public Debt less value of Sinking Funds.</i>	<i>Revenue.</i>	<i>Expenditure.</i>	<i>Imports.</i>	<i>Domestic Exports.</i>	<i>Total Exports.</i>
				£	£	£	£	£	£
EAST AFRICA—									
Kenya ...	219,730 + 5,230 (water)	3,084,721 (a)	14.0	16,162,826 (e)	2,000,601 (f) (12s. 11½d. per head).	1,989,669 (f) (12s. 10½d. per head).	3,586,123 (£1 3s. 2½d. per head).	2,364,302 (15s. 4d. per head).	7,291,372
Uganda ...	80,588 + 13,616 (water)	3,620,193 (a)	44.9	2,235,600	1,301,465 (f) (7s. 2½d. per head).	1,298,931 (f) (7s. 2d. per head).	1,312,599 (7s. 3d. per head).	3,539,282 (19s. 6½d. per head).	
Tanganyika Territory	339,000 + 21,000 (water)	5,038,590 (a)	14.9	8,500,720 (e)	1,565,717 (f) (6s. 2½d. per head).	1,746,555 (f) (6s. 11d. per head).	2,073,277 (8s. 2½d. per head).	2,543,162 (10s. 1d. per head).	2,772,856
Nyasaland ...	37,596 + 10,353 (water)	1,611,314 (a)	42.9	3,570,000	358,778 (f) (4s. 5d. per head).	407,732 (f) (5s. 0½d. per head).	725,254 (9s. 0d. per head).	513,644 (6s. 4½d. per head).	
Northern Rhodesia ...	290,323	1,382,491 (a)	4.8	2,347,000 (e)	591,852 (f) (8s. 6½d. per head).	630,808 (f) (9s. 1½d. per head).	1,980,190 (£1 8s. 7½d. per head).	3,588,609 (£2 11s. 11d. per head).	3,747,354
Zanzibar ...	1,020	237,374 (a)	232.7	Nil	419,809 (f) (£1 15s. 4½d. per head).	413,164 (f) (£1 14s. 10d. per head).	841,192 (£3 10s. 10½d. per head).	640,353 (£2 13s. 11d. per head).	
Somaliland ...	68,000 (approx.)	344,700 (a)	5.1	220,000 (e)	93,490 (f) (5s. 5d. per head).	153,596 (f) (8s. 11d. per head).	323,830 (18s. 9½d. per head).	145,978 (8s. 5½d. per head).	200,679
TOTAL ...	(approx.) 1,036,000 + 50,200 (water)	15,319,400 (approx.)	14.8	33,036,146	6,331,712 (8s. 3d. per head).	6,640,455 (8s. 8d. per head).	10,842,465 (14s. 2d. per head).	13,335,330 (17s. 5d. per head).	
SOUTH AFRICA HIGH COMMISSION TERRITORIES—									
Basutoland ...	11,716	600,000 (approx.)	51.2	Nil	239,980 (j) (8s. 0d. per head).	277,097 (j) (9s. 3d. per head).	611,110 (£1 0s. 4d. per head).	Not available	330,157
Bechuanaland Protectorate.	275,000	152,983 (c)	0.6	Nil	78,155 (j) (10s. 2½d. per head).	164,078 (j) (£1 1s. 5½d. per head).	150,896 (19s. 8½d. per head).	27,964 (3s. 8d. per head).	
Swaziland ...	6,704	125,775 (a)	18.8	38,319 (i)	85,874 (j) (13s. 8d. per head).	110,970 (j) (17s. 8d. per head).	Not available	111,168 (17s. 8d. per head).	129,035
TOTAL ...	293,420	878,700 (approx.)	3.0	38,319	404,009 (9s. 2d. per head).	552,145 (12s. 7½d. per head).	—	—	
									487,156

STATEMENT SHOWING GENERAL STATISTICS RELATING TO THE COLONIAL EMPIRE—continued.

<i>Colony, etc.</i>	<i>Area in square miles.</i>	<i>Population.</i>	<i>Density of population per square mile.</i>	<i>Public Debt less value of Sinking Funds.</i>	<i>Revenue.</i>	<i>Expenditure.</i>	<i>Imports.</i>	<i>Domestic Exports.</i>	<i>Total Exports.</i>
				<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
EASTERN—contd.									
Brunei ...	(approx.) 2,500	32,900 (a)	13·2	44,683 (c)	65,216 (f) (£1 19s. 8d. per head).	59,379 (f) (£1 16s. 1d. per head).	281,373 (£8 11s. 0½d. per head).	Not available.	255,621
North Borneo ...	(approx.) 29,500	274,195 (a)	9·3	1,646,480 (c)	246,292 (f) (17s. 11½d. per head).	209,988 (f) (15s. 4d. per head).	394,093 (£1 8s. 9d. per head).	Not available.	702,526
Sarawak ...	(approx.) 50,000	475,000 (a)	9·5	Nil	415,168 (h) (17s. 6d. per head).	414,059 (h) (17s. 5½d. per head).	1,324,996 (£2 16s. 9½d. per head).	Not available.	1,677,559
<i>Malayan Group Total</i> ...	(approx.) 133,200	5,061,969	38·0	27,425,510	11,054,677 (£2 3s. 8d. per head).	12,444,252 (£2 9s. 2d. per head).	66,295,781 (£13 1s. 11d. per head).		70,868,706
Hong Kong ...	391	922,643 (a)	2,359·7	901,557 (c)	2,143,356 (f) (£2 6s. 5½d. per head).	2,271,686 (f) (£2 9s. 3d. per head).	36,498,316 (£39 11s. 2d. per head).	Not available.	36,374,593
Mauritius ...	809	401,007 (a)	495·7	1,547,325 (m)	1,092,849 (u) (£2 16s. 3d. per head).	1,061,879 (u) (£2 12s. 11½d. per head).	2,177,643 (£5 8s. 7d. per head).	2,357,129 (£5 17s. 7d. per head).	2,429,233
Seychelles ...	156·25	28,731 (a)	183·9	Nil	41,828 (h) (£1 9s. 1½d. per head).	46,750 (h) (£1 12s. 6½d. per head).	62,621 (£2 3s. 7d. per head).	67,572 (£2 7s. 0½d. per head).	67,799
TOTAL ...	159,888 + 149 (water)	11,877,550	74·2	38,862,590	20,914,267 (£1 15s. 2½d. per head).	22,553,450 (£1 18s. 0d. per head).	118,335,454 (£9 19s. 3d. per head).		123,480,689
MEDITERRANEAN—									
Gibraltar ...	1·875	16,397 (a)	8,745·1	Nil	158,508 (f) (£9 13s. 4d. per head).	156,878 (f) (£9 11s. 4d. per head).	Not available.		
Malta ...	121·844	251,832 (a)	2,066·9	79,081 (p)	896,572 (g) (£3 11s. 2½d. per head).	916,211 (g) (£3 12s. 9d. per head).	3,479,054 (£13 16s. 3d. per head).	143,445 (11s. 5d. per head).	229,947
Cyprus ...	3,572	357,934 (a)	100·2	615,000 (e)	686,210 (f) (£1 18s. 4d. per head).	670,915 (f) (£1 17s. 6d. per head).	1,257,368 (£3 10s. 3d. per head).	814,951 (£2 5s. 6½d. per head).	893,798

Palestine ...	(approx.)	10,100	1,119,000 (r)	110.8	4,259,361 (i)	3,333,655 (j) (£2 19s. 7d. per head).	2,927,458 (j) (£2 10s. 6½d. per head).	11,268,795 (£10 1s. 5d. per head).	2,591,617 (£2 6s. 4d. per head).	3,752,797
TOTAL ...		13,796	1,745,163	126.5	4,953,442	5,074,945 (£2 18s. 2d. per head).	4,571,462 (£2 12s. 4½d. per head).	16,005,217 (£9 3s. 5d. per head).	3,550,013 (£2 0s. 8d. per head).	4,876,542
WEST INDIES AND AMERICA—										
Bahamas ...	(approx.)	4,400	62,679 (a)	14.2	141,175 (i)	205,425 (j) (£3 5s. 6½d. per head).	202,380 (j) (£3 4s. 7d. per head).	894,599 (£14 5s. 5½d. per head).	147,067 (£2 6s. 11d. per head).	180,151
Barbados ...	(approx.)	166	180,055 (a)	1,084.7	226,542 (i)	363,384 (j) (£2 0s. 4d. per head).	361,449 (j) (£2 0s. 0d. per head).	1,740,161 (£9 13s. 3d. per head).	1,258,193 (£6 19s. 9d. per head).	1,369,963
Bermuda ...		19.25	29,116 (a)	1,512.5	79,423 (e)	350,406 (f) (£12 0s. 8½d. per head).	341,643 (f) (£11 14s. 8d. per head).	1,397,066 (£47 19s. 8d. per head).	62,588 (£2 3s. 0d. per head).	119,578
British Guiana ...	(approx.)	89,500	321,260 (a)	3.6	3,828,776 (e)	924,806 (f) (£2 17s. 7d. per head).	921,371 (f) (£2 17s. 4½d. per head).	1,801,966 (£5 12s. 2d. per head).	2,018,551 (£6 5s. 8d. per head).	2,074,998
British Honduras ...		8,598	53,770 (a)	6.3	498,957 (i)	90,167 (n) (£1 13s. 6½d. per head).	164,748 (n) (£3 1s. 3½d. per head).	347,142 (£6 9s. 1½d. per head).	89,323 (£1 13s. 3d. per head).	214,423
CORRIGENDA.										
On page 455 the figures shown against "Jamaica and Dependencies Total" in the										
"Imports, 1933" column should read as follows:—										
"£4,421,493 (£4 0s. 3d. per head)."										
Jamaica and Dependencies Total ...		4,806	1,101,859	229.2	3,108,887	1,930,770 (£1 15s. 0½d. per head).	1,965,653 (£1 15s. 8d. per head).	421,493 (7s. 8d. per head).	2,418,955 (£2 3s. 11d. per head).	2,771,199
Leeward Islands—										
Antigua and Barbuda...		170	32,424 (a)	190.7	19,658 (e)	71,900 (f) (£2 4s. 4d. per head).	79,438 (f) (£2 9s. 0d. per head).			
Dominica ...		304	45,239 (a)	148.8	5,291 (e)	47,229 (f) (£1 0s. 10½d. per head).	66,976 (f) (£1 9s. 7d. per head).			

STATEMENT SHOWING GENERAL STATISTICS RELATING TO THE COLONIAL EMPIRE—continued.

Colony, etc.	Area in square miles.	Population.	Density of population per square mile.	Public Debt less value of Sinking Funds.	Revenue.	Expenditure.	Imports. 1933.	Domestic Exports. 1933.	Total Exports. 1933.
				£	£	£	£	£	£
WEST INDIES AND AMERICA—contd.									
Leeward Islands—cont. Montserrat ...	32	13,062 (a)	408.2	1,434 (e)	15,501 (f) (£1 3s. 9d. per head).	22,778 (f) (£1 14s. 10½d. per head).			
St. Kitts-Nevis ...	152	36,888 (a)	242.7	16,916 (e)	88,379 (f) (£2 7s. 11d. per head).	87,929 (f) (£2 7s. 8d. per head).			
Virgin Islands ...	67	5,360 (a)	80.0	Nil	4,270 (f) (15s. 11½d. per head).	6,807 (f) (£1 5s. 5d. per head).			
Leeward Islands—Total ...	725	132,973	183.4	43,299	227,279 (£1 14s. 2d. per head).	263,928 (£1 10s. 8½d. per head).	611,535 (£4 12s. 0d. per head).	558,526 (£4 4s. 0d. per head).	583,684
Trinidad and Tobago	1,980	425,572 (a)	214.9	2,750,967	1,604,203 (f) (£3 15s. 5d. per head).	1,462,694 (f) (£3 8s. 9d. per head).	4,001,721 (£9 8s. 0½d. per head).	4,324,114 (£10 3s. 2½d. per head).	4,598,421
Windward Islands—									
Grenada and Carriacou.	132.8	82,624 (a)	622.2	169,713 (e)	106,959 (f) (£1 5s. 10½d. per head).	112,921 (f) (£1 7s. 4d. per head).	230,541 (£2 15s. 9½d. per head).	186,008 (£2 5s. 0d. per head).	198,069
St. Lucia ...	238	62,000 (a)	260.5	116,608 (e)	71,141 (f) (£1 2s. 11½d. per head).	76,836 (f) (£1 4s. 9½d. per head).	167,010 (£2 13s. 10½d. per head).	92,607 (£1 9s. 10½d. per head).	98,478
St. Vincent and Grenadines.	133 } 150.3 17.3 }	52,006 (a)	346.0	85,370 (e)	63,435 (f) (£1 4s. 5d. per head).	63,190 (f) (£1 4s. 4d. per head).	148,647 (£2 17s. 2d. per head).	112,265 (£2 3s. 2d. per head).	119,130
Windward Islands—Total ...	521	196,630	377.4	371,691	241,535 (£1 4s. 7d. per head).	252,947 (£1 5s. 8d. per head).	546,198 (£2 15s. 6½d. per head).	390,880 (£1 19s. 9d. per head).	415,677

Falkland Islands	...	(approx.)	4,618	2,427 (a)	0.5	Nil	66,555 (f) (£27 8s. 5½d. per head).	56,367 (f) (£23 4s. 6d. per head).	269,818 (£111 3s. 5½d. per head).	454,325 (£187 3s. 11d. per head).	454,325
TOTAL	...		121,385	3,937,803	32.4	14,573,594	6,004,530 (£1 10s. 6d. per head).	5,993,180 (£1 10s. 5½d. per head).	12,031,399 (£3 1s. 1d. per head).	11,722,522 (£2 19s. 6½d. per head).	12,782,419
On page 457 the figures shown against Total (of West Indies and America) in the "Imports, 1933" column should read as follows:—											
"£16,031,399 (£4 1s. 5d. per head)"											
and the figures in the same column for the <i>Grand Total</i> should read:—											
"£176,932,451 (£2 19s. 7d. per head)." (32989) P.St.											
Tonga (z)	...	...	---	---	---	---	43,577 (j) (9s. 3d. per head).	48,182 (j) (10s. 3d. per head).	127,021 (g) (£1 7s. 0d. per head).	87,358 (g) (18s. 7d. per head).	87,358
New Hebrides	...	(approx.)	5,700	between 42,000 (z) and 62,000	between 7.2 and 10.9	Nil	48,684 (w) (£1 11s. 8d. per head).	53,362 (w) (£1 14s. 10d. per head).	68,806 (£2 4s. 10d. per head).	90,919 (£2 19s. 3d. per head).	91,558
TOTAL	...	(approx.)	24,690	404,100	16.4	1,139,006	639,263 (£1 11s. 7½d. per head).	683,377 (£1 13s. 10d. per head).	1,345,802 (£3 6s. 7d. per head).	1,948,056 (£4 16s. 5d. per head).	2,121,113
GRAND TOTAL	...	(approx.)	2,146,000 + 50,349 (water)	(approx.) 59,400,000	27.7	129,594,392	46,612,827 (15s. 8½d. per head).	48,566,603 (16s. 4d. per head).	172,932,451 (£2 18s. 3d. per head).	(approx.) 95,666,000 (£1 12s. 4d. per head).	177,655,975

(a) Estimated figures, 1933.

(b) According to the Census of 1931.

(c) According to the Census of 1921.

(d) As at 30th June, 1933.

(e) As at 31st December, 1933.

(f) On the basis of the Estimates for 1934.

(g) For the year ended 31st March, 1934.

(h) For the year 1933.

(i) As at 31st March, 1934.

(j) On the basis of the Estimates for the year ended 31st March, 1935.

(k) As at 30th September, 1933.

(l) On the basis of the Estimates for the year ended 30th September, 1935.

(m) As at 30th June, 1934.

(n) On the basis of the Estimates for nine months to 31st December, 1934.

(o) For the year ended 30th June, 1933.

(p) As at 31st March, 1933.

(q) For the year 1934-35.

(r) Estimated figures, 30th September, 1934.

(s) As at 31st August, 1934.

(t) According to Census of 1933.

(u) On the basis of the Estimates for the year ended 30th June, 1935.

(v) Condominium revenue and expenditure.

(w) On the basis of the Estimates for the year ended 30th June, 1934.

(z) Estimated figures, April, 1934.

(y) Values in sterling, converted at the rate £111 Fiji=£100 sterling.

(z) Values in sterling, converted at the rate £125=£100 sterling.

PART II.—THE PRODUCTS OF THE COLONIAL EMPIRE

THE PRINCIPAL PRODUCTS OF THE COLONIAL EMPIRE.

The Dependencies which together make up the Colonial Empire are still in that state of development in which the principal, and in most cases the only, occupation of their inhabitants is primary production. The only Dependencies in which there is any substantial production of manufactured goods are the Straits Settlements, Hong Kong, and Palestine, but even in these Dependencies industrial production is not the principal occupation of the inhabitants. Hong Kong and, in the Straits Settlements, Singapore and Penang are great entrepôt ports. The remainder of the Straits Settlements and Palestine are still predominantly agricultural countries.

Gibraltar and Malta stand in a class by themselves, as great naval and military centres as well as entrepôt ports, but even in Malta agriculture plays a large part in the economic life of the community.

In one or two other Dependencies the tourist traffic is of more importance than primary production.

Among all the primary products of the Colonial Empire it would be difficult to pick out any single product or group of products as being "the principal product" of the Colonial Empire, but it is not difficult to indicate those products which are of major importance to large parts of the Colonial Empire.

Nevertheless it is impossible to assess the value of some of the most important of these products statistically.

The products upon which the vast majority of the inhabitants of the Colonial Empire depend for their livelihood are the great food staples, that is the cereals including rice, the tubers, certain oil-seeds and nuts particularly coconuts and groundnuts, certain fruits, particularly bananas and plantains, and, though less important except in certain areas, livestock.

As will be seen from the table at the end of this memorandum few of these products figure in the list of principal exports. Indeed, except in certain Dependencies, most of which are islands, the great bulk of the inhabitants of the Colonial Empire are much more occupied in producing foodstuffs and a limited range of raw materials for their own use and for local sale than they are in producing for the export market.

Except in a few Dependencies the proceeds of external trade are used more to provide luxuries and semi-luxuries and to meet the expenses of government than to provide the population with primary necessities.

Self-sufficiency is in no sense the policy of His Majesty's Government or the local Governments for the Colonial Empire, on the contrary everything possible is being done to encourage and develop the export trade on sound lines, but, if the time ever came when a policy of economic nationalism in those foreign countries which have hitherto afforded large markets for Colonial products developed to such an extent as to close a number of those markets, the Colonial Empire would fare a great deal better than many other countries, and the ever-increasing development of trade within the Empire would do much to restore the balance.

Until 1931, and for a number of years previously, the most valuable Colonial product was rubber, but in that year the great fall in the price of rubber reduced the value of exports to such an extent that minerals, although the value of mineral exports also was greatly reduced, owing principally to the fall in the price and production of tin, took the first place.

In 1932 the great group of oil-seeds and nuts and vegetable oils, although they too had lost much of their value, took the second place passing rubber for the first time. Indeed from many points of view this group is the most important of the export products to the Colonial Empire as a whole. Rubber is of little or no importance outside Malaya and Ceylon, and the minerals are almost exclusively an export product and of importance only to comparatively few Dependencies, but the oil-seeds group is of major importance both to the internal economic life and to the external trade of much more than half the Colonial Empire. In 1933 rubber regained the second place.

Of commodities of the second rank sugar is of the widest importance, since several Dependencies are almost wholly dependent on their sugar crop for their existence. Sugar is almost exclusively an export product, and, unlike most Dependencies, a number of the sugar-producing Colonies have specialized on sugar to such an extent that they are largely dependent on imports for their essential foodstuffs.

The other two commodities in this class are tea, which is the principal export of Ceylon and of little importance to any other part of the Colonial Empire, and cocoa which is the principal export of the Gold Coast and Grenada and an important export of Nigeria and Trinidad.

Except for fruit, which passed the £5 million mark for the first time in 1932, but fell below it again in 1933, and cotton, which regained a good deal of ground in 1933, no other export commodity not included in one of the larger groups reached in that year a value of as much as a third of the value of any one of the commodities previously mentioned, and although certain of these remaining products had considerable local importance none of them except perhaps timber, which is a special case, could be described as being of major importance to the Colonial Empire as a whole.

In the following table the principal export products of the Colonial Empire are arranged in order of importance by reference to the 1933 values. The table includes all products of which the export value in that year exceeded £½ million.

The larger groups and the most important individual commodities not included in any group are shown in Roman type and the most important of the commodities included in the larger groups are shown in *italics*.

Commodity	1930 £	1931 £	1932 £	1933 £
Minerals	22,283,000	15,806,000	15,113,000	18,059,000
Rubber	26,915,000	13,115,000	8,898,000	13,035,000
Oil-seeds and nuts and vegetable oils	19,180,000	11,740,000	13,155,000	11,536,000
Tea	13,719,000	10,468,000	8,150,000	8,981,000
Sugar and sugar products	6,700,000	5,968,000	7,655,000	8,661,000
Cocoa	10,463,000	7,843,000	7,908,000	6,966,000
Tin	10,656,000	7,064,000	4,441,000	5,302,000
Fruit and fruit products...	4,613,000	4,180,000	5,042,000	4,305,000
<i>Palm oil and kernels</i> ...	7,876,000	4,328,000	5,155,000	3,983,000
Copper	475,000	700,000	2,254,000	3,310,000
Cotton	2,758,000	1,964,000	1,935,000	3,290,000
<i>Petroleum</i>	4,475,000	2,986,000	3,257,000	3,107,000
Gold	1,278,000	1,556,000	2,274,000	2,937,000
<i>Groundnuts</i>	3,322,000	2,055,000	2,465,000	2,739,000
<i>Copra</i>	4,892,000	3,043,000	2,767,000	2,322,000
<i>Citrus fruit</i>	1,077,000	1,095,000	1,989,000	2,270,000
Coffee	2,169,000	1,597,000	2,169,000	1,731,000
Hides and skins	1,805,000	1,344,000	1,185,000	1,323,000
Fibres other than cotton	1,881,000	1,127,000	1,040,000	1,308,000
<i>Bananas</i>	2,408,000	2,093,000	2,003,000	1,158,000
<i>Coconut oil</i>	1,282,000	1,111,000	1,331,000	1,103,000
Spices and condiments ...	1,522,000	1,447,000	1,099,000	1,078,000
<i>Pineapples</i>	926,000	834,000	932,000	740,000
<i>Diamonds</i>	1,008,000	556,000	658,000	718,000
Timber and wood	1,147,000	887,000	752,000	681,000
Tobacco	737,000	672,000	811,000	631,000
<i>Desiccated coconut</i> ...	753,000	512,000	536,000	506,000

ANIMALS AND ANIMAL PRODUCTS.

An account of the position of animal husbandry in each Dependency will be found in the relevant Section (VA. 3) of the memoranda in Part I of this volume. There are few Dependencies in which this branch of production is at present of substantial importance in the economic life of the community.

In the Falkland Islands and Somaliland animal husbandry is the only important local industry and provides the great bulk of the export trade.

In Kenya, Tanganyika Territory, the Northern Provinces of Nigeria, and the Gold Coast, there are pastoral tribes which depend almost entirely on their flocks and herds for their livelihood, and in these areas therefore animal husbandry is an important element in the economic life of the people. It is of little importance for the export trade, but there is a substantial internal trade particularly between the Northern and Southern Provinces of Nigeria.

In a few other Dependencies there is an important internal trade in live animals and animal products. In Northern Rhodesia for instance stock-farming, chiefly with the object of supplying meat for the workers in the mines, is an occupation of the European settlers.

In Malaya the stock-farmers of Kedah and Kelantan, the only two States on the Peninsula which contain even moderately good grazing lands, and also those of North Borneo, have a fairly substantial export trade to other parts of the Peninsula.

In Jamaica a fairly substantial animal industry exists, mainly for the supply of local demands for meat and dairy products.

So far as the export trade is concerned, the following paragraphs give a brief summary of the position in regard to the few items in this group.

Live Animals.—Live animals for food are exported:

- (1) from Somaliland chiefly to Aden and Southern Arabia and also to Abyssinia,
- (2) from Tanganyika Territory and Northern Rhodesia in small quantities, chiefly to Portuguese East Africa,
- (3) from Nigeria in small quantities by sea to the Gold Coast and in unknown, but probably larger, quantities over the land frontiers to French West Africa,
- (4) from British Guiana, Grenada, and St. Vincent in small quantities to neighbouring British West Indian islands, chiefly Trinidad and Barbados,
- (5) from St. Kitts-Nevis, Montserrat and the Virgin Islands in small quantities to neighbouring British and foreign territories.

Cyprus has a substantial export trade in transport as well as in food animals and exports of oxen to Palestine and mules to Egypt, Palestine, and Syria were the fourth largest group of exports in 1934.

Hides and Skins are exported from a very large number of Dependencies, and the aggregate value of exports from the whole Colonial Empire is very substantial. In 1929, the total value was not far short of £2,500,000; by 1933 it had fallen to a little over half that value.

The largest individual exporter is Nigeria with exports valued in 1933 at over £620,000, but this represents only about 7 per cent. of the value of total exports of the Colony in that year.

In 1933, Kenya and Uganda together exported hides and skins to a value of over £180,000 and Tanganyika Territory hides and skins to a value of over £160,000. Malaya's exports were a little over £118,000 but included an unknown, but possibly substantial, quantity of re-exports, Somaliland's exports were a little over £80,000 and Ceylon's and Jamaica's just over £20,000. No other Dependency reached a figure of £20,000.

In the case of Somaliland the value of the hides and skins exported represents about 40 per cent. of total exports, but in other cases the percentage is small.

Table I* contains a complete statement of all exports of hides and skins from the Colonial Empire in the years 1930 to 1933.

Wool.—Sheep-farming is almost the only industry of the Falkland Islands (excluding the Dependencies) and wool is the only important export from that Colony. The quantities involved are substantial. In 1928, the total value amounted to over £280,000 but in 1933 fell to just over £100,000.

Wool is also exported from Kenya and Cyprus.

Dairy products.—There are dairying industries in certain Dependencies, but few of them aspire to more than supplying the local demand for fresh milk and butter. The only exports are mentioned in the following paragraphs.

Butter is exported in appreciable quantities from Kenya and Fiji, chiefly to the United Kingdom (in the case of Fiji for the most part *via* New Zealand), and in small quantities from Northern Rhodesia.

The following table shows total exports in recent years:—

	Quantity.					Value.				
	1929. cwt.	1930. cwt.	1931. cwt.	1932. cwt.	1933. cwt.	1929. £	1930. £	1931. £	1932. £	1933. £
Kenya	1,830	7,800	6,326	9,182	7,514	15,126	53,016	35,618	40,301	27,268
Fiji	714	903	1,612	2,421	1,837	5,747	6,496	7,519	11,299	7,564
Northern Rhodesia ...	57	8	60	8	6	551	76	434	78	33

Cheese is exported in small quantities from Cyprus to Egypt, from Kenya to Tanganyika Territory, and from Palestine to Syria.

Ghee (clarified butter) is produced chiefly for local consumption but there is small interchange between Kenya and Tanganyika Territory, and both Dependencies send small quantities to Zanzibar. Considerable progress has been made in recent years in both Kenya and Tanganyika Territory in improving the quality of the ghee produced, and production is expanding in quantity. Somaliland sends fairly substantial quantities (value in 1933, £5,912) to Aden. The development of the production of ghee in Nigeria has been stimulated in recent years and exports to the United Kingdom were made in 1932. Increased quantities were exported in 1933 and further development is expected.

Bacon and ham are exported in small quantities from Kenya to Tanganyika Territory, and there is some prospect of building up a more substantial export trade to oversea destinations.

Increasing interest is also being taken in poultry. Improvement of poultry is receiving attention in many dependencies and small quantities of eggs have been exported from Kenya.

CEREALS (OTHER THAN RICE).

Very large areas are under cereal crops in the Colonial Empire, and the aggregate annual production is very large. Except for rice, which is dealt with in a separate memorandum, almost the whole of the production of cereals is consumed at or near the place of growth, and only small quantities, which consist almost entirely of maize, enter the export market. It is quite impossible to frame any estimate, even approximate, of acreage or production, since no statistics exist for acreages under dry grain crops in the majority of the Dependencies.

The dry grains consist chiefly of maize or Indian corn, the greater millets such as guinea corn, bulrush, and pearl millets, and the lesser millets such as the Italian or foxtail millet and finger millet (*Eleusine coracana*). Where the rainfall is adequate, maize is the main cereal food crop, but where the rainfall is smaller guinea corn becomes the main crop, and where the rainfall is scanty, or the wet season short, the bulrush and pearl millets become general and the lesser millets more common. These crops may be grown as pure crops or they may be mixed. It is common to find maize grown with guinea corn, particularly in areas where there is some uncertainty in regard to adequate rainfall; similarly in the areas with climatic conditions bordering on uncertainty for pure stands of guinea corn there will be mixtures of guinea corn with bulrush millet, of guinea corn with pearl millet and of guinea corn or bulrush millet with the lesser millets. Similarly in very many instances the cereal crops are grown mixed with other food crops, pulses such as cow peas being commonly grown with cereal crops.

In certain Dependencies maize constitutes the main dry-land cereal crop, but in others guinea corn ranks easily as the most important. In some areas the bulrush and pearl millets provide the main cereal foods. Guinea corn for example is the main food of the north of Nigeria and provides flour for food, bran as food for cattle, leaves as cattle food and fodder, whilst the stalks are used in the erection of houses and fences and for fuel. In other areas, such as parts of Tanganyika, the bulrush millet is the chief cereal, and again in parts of Uganda and Nyasaland the finger millet constitutes the staple cereal food. Of the smaller millets there are a number which, although of general minor importance, are of considerable significance to particular areas.

* See page 533.

Yellow maize has a higher dietetic value than white maize or the millets, and pearl millet is more nutritious than guinea corn or the lesser millets.

Dry-land cereals are largely used for the production of native beer, the guinea corn being favoured for this purpose in some Dependencies and the finger millet in others.

Some of the cereals grown in temperate countries, such as wheat and barley, are also grown in certain Dependencies. Wheat is grown in Kenya from whence exports are occasionally made. It constitutes the main cereal crops of Cyprus and Malta. In Cyprus, one-third of the total cultivable area is sown with wheat and one-fifth with barley. All the wheat grown is consumed locally, but there are occasional exports of barley. Palestine also is an exporter of barley. Malta consumes all its own wheat and imports a good deal in addition.

Maize (also called *mealies* and *Indian corn*) is the staple cereal foodstuff of a part of the native populations in most of the East African Dependencies and in the wetter parts of West Africa. There is some production in other parts of the Colonial Empire such as the West Indies, certain parts of Ceylon, etc., but maize there is of very much less importance and is not the staple foodstuff.

In Kenya maize is the most widely-grown crop both in the native reserves (where it is estimated that altogether one and three-quarter million acres are under some kind of cultivation) and on European estates where a little over 160,000 acres were under this crop in the season 1932-33. No estimate can be made of the native production. European production was approximately 101,750 tons, of which 56,658 tons valued at £213,000 were exported, over two-thirds to the United Kingdom and the rest to a wide range of countries of which Italian Somaliland was the most important. Except for a small exports of maize from Tanganyika Territory this is the only cereal export of any significance from the Colonial Empire.

There are wide variations in the colour and shape of the grain of different varieties of maize, the colour ranging from yellow to white and the shape from spherical to almost flat. The type principally grown in Kenya (and also in other East African territories and in Southern Rhodesia) is a flat white "dent" maize. This type of maize enjoys a preference in the United Kingdom, foreign flat white maize, unlike other kinds, being subject to an import duty of 10 per cent. *ad valorem*, and is particularly suited to certain industrial uses, notably the manufacture of cornflour. In so far as it is required for those uses, it commands a higher price than other sorts of maize. If supplies, however, exceed the demand for these special purposes, the surplus commands no higher a price than the other varieties, and indeed for certain uses, for example as chicken food, it is less esteemed than yellow maize.

In Uganda maize is grown in small quantities, but is of very little importance.

In Tanganyika Territory maize is the second most important food crop, but the area under this crop, some 840,000 acres in 1933, is less than half that under millet. Production has been gradually increasing. In 1932 exports exceeded imports for the first time by a margin of about 2,500 tons, but in 1933 imports again exceeded exports by some 1,950 tons.

In Northern Rhodesia maize is the most important, but by no means the only, native foodstuff. It is also grown by Europeans, the area under this crop being about 34,000 acres and the production rather over 10,000 tons.

In Nyasaland maize is an important foodstuff, but no statistics of acreage or production are available.

In Zanzibar and Somaliland production is only small.

In the Gambia, Gold Coast, and Sierra Leone maize is grown, but is not one of the major crops. In Nigeria, however, it and yams are the two staple foodstuffs in the Southern Provinces. No statistics of acreage or production are available for West Africa.

Of the Eastern Dependencies, Ceylon and certain Malay States, notably Johore and Kedah, grow maize as one of a number of food crops.

Maize is also grown in small quantities in all tropical dependencies, and a small industry exists in St. Vincent.

Millets are most important foodstuffs in the East and West African Dependencies, in the drier parts of Ceylon and in certain other Dependencies. A few thousand tons of sorghum are also produced in Palestine. The great millet or sorghum is known as "guinea corn" in West Africa, "kaffir corn" in Northern Rhodesia and South Africa, and *durra* in Egypt and the Sudan. These types have very diverse characters and are separated into species of sorghum.

In Kenya sorghum and other millets are among the most important native foodstuffs, but are not much grown by Europeans.

In Uganda millets are the staple cereal foodstuff in the drier parts of the Protectorate, and it is estimated that nearly a million acres are under these crops. Finger millet is largely grown.

In Tanganyika Territory millets constitute the most important native foodstuffs, and it is estimated that between one and a-half and two million acres are under this crop with an annual production of about half a million tons. Bulrush millet is very largely grown, and considerable areas of foxtail millet and finger millet are annually sown.

In Northern Rhodesia kaffir corn (sorghum) and bulrush and finger millets are among the principal food crops.

In Nyasaland the millets are an important foodstuff and they are also grown in Zanzibar and Somaliland.

In Nigeria guinea corn (sorghum) and other millets are the staple foodstuff of the Northern Provinces and they are also grown in the other West African Dependencies.

In Ceylon rice is, of course, the principal foodstuff, but various kinds of millet including finger millet, Italian or foxtail millet and a number of small millets are important subsidiary foodstuffs.

The cereals grown in temperate climates are of little importance in the Colonial Empire.

Barley is a crop of some importance in Cyprus. A little over 100,000 acres, about 40 per cent. of the total area under cereals, are under this crop, and production in 1933 was over a million

and a half bushels. Owing to drought the crop was a small one; in 1928, it was nearly 3 million bushels although the acreage was only about 125,000 acres.

There was formerly some export for malting purposes but this trade has now somewhat fallen away.

Barley is the second most important cereal crop in Palestine and production in normal years is of the order of 50 to 75,000 tons. This crop is usually insufficient for local requirements, and there are imports of up to 20,000 tons in addition in years when the crop is small.

There is also a small production of barley in Tanganyika Territory, Somaliland, and Malta.

Oats are a minor cereal crop in Cyprus, the area in 1933 being 10,718 acres and the production 168,867 bushels.

Wheat is the most important member of the group.

In Kenya it is grown principally by Europeans, but has been rather a disappointing crop. In 1928, the area was as much as 83,000 acres, but by 1932-33 this had shrunk to a little over 30,000 acres and the total production was only about 5,670 tons, which was less than the actual requirements of the Colony.

In Tanganyika Territory about 10,500 acres and in Northern Rhodesia about 2,200 acres are under wheat.

In Cyprus wheat is the most important cereal; over 170,000 acres, approximately 60 per cent. of the total area under cereals, are under this crop, and production in 1933 was rather over a million and a half bushels. This figure was a low one, owing to drought; in 1929 production was over 2 million bushels. The whole crop is consumed locally and is supplemented by substantial imports.

In Malta nearly 10,000 acres are under wheat and the production in 1933 was nearly 300,000 bushels. This is only about a quarter of the local requirements.

In Palestine wheat is the most important cereal and provides the staple foodstuff of large sections of the population. Production in normal years is not far short of 100,000 tons, but this is usually insufficient for local requirements and there are imports of up to 20,000 tons of wheat, as well as another 15 or 20,000 tons of flour in years when the crop is short. Against this there are sometimes exports of moderate amount.

Buckwheat is grown in Kenya and in some parts of certain other East African territories.

COCOA.

Method of Production.

The cocoa tree (*Theobroma Cacao*) is a native of the forests of Central and South America, and requires certain definite climatic conditions for its successful growth. It will not flourish in a climate where the temperature falls below 60° F., and requires a high degree of humidity and shelter from wind.

The tree bears pods, each of which contains a mass of 25 to 40 seeds or beans, covered with a white pulp. There are usually two crops a year, a main crop which in the principal producing areas in Africa ripens in about September or October and a small "mid crop" ripening four or five months later. The crops come to maturity at different times of the year in different parts of the world.

The pods are cut off from the stems and branches of the tree when ripe and then broken open and the beans, which in this state are known as "wet cocoa," are extracted from the shells.

The beans are then fermented in heaps or in boxes in fermentaries. They are mixed, stirred, or turned over at intervals to ensure even fermentation and then spread out to dry in the sun or, in some countries, in drying machines. They are then packed in bags, which vary in weight in different countries, but in West Africa usually weigh about 140 lb. each, or 16 to the ton, and shipped overseas. Both under and over fermentation seriously affect the value of the product.

In the manufacturing stage the beans are first cleaned, sorted into sizes and roasted. They are then cracked and winnowed to separate the thin shells from the angular fragments known as cocoa nibs. The nibs when ground become liquid owing to their large content of fat or cocoa butter, but set into "cocoa mass" which is unsweetened chocolate. From the cocoa mass, drinking cocoa is made by extracting, under pressure, a large proportion of the cocoa butter and grinding the residue. To make eating chocolate, additional cocoa butter and sugar are ground up with the mass.

Varieties.

The classification of cocoas is difficult as there are several varieties and sub-varieties and much hybridization has occurred.

There are however, two main varieties, *Criollo* and *Forastero*. The *Criollo*, which is finer and more delicate, produces plump, rounded beans which are white or pale violet inside and only slightly bitter. *Forastero* is a hardier tree but produces beans which are flatter, deeper coloured, more bitter and consequently less valuable than *Criollo*. Amongst the sub-varieties of *Forastero* are the higher-grade strains grown in Venezuela, Trinidad, Java and Central America; *Amelonado*, from which most of the world's crop is obtained, grown in West Africa, Brazil and Santo Domingo; and *Calabacillo*, the hardiest but poorest of all, with small, very flat and very bitter deep purple beans. The general tendency has been for *Criollo* to be gradually replaced by *Forastero* and areas of pure *Criollo* are now rare.

Of a total world production of rather over 500,000 tons a year it is estimated that less than 1,000 tons are pure *Criollo*, but both pure *Criollo* and nearly pure strains, including the higher *Forastero* varieties, are all regarded as "fine cocoa." There are, therefore, now three broad

divisions recognized by the markets, first the *Criollo* and "near *Criollo*" cocoas such as are produced in Ecuador, Venezuela, Java, Samoa, and Ceylon, secondly the higher *Forastero* cocoas such as are produced in Trinidad and, to a lesser extent, in Grenada and lastly the "common" or bulk cocoas of *Forastero* strain produced in West Africa and Brazil.

Market Grades.

The fine cocoas are sold under geographical grade names. West African cocoa, however, is sold by the shippers on the basis of contracts in which allowance is made for the percentage of commercial defects found in the parcel.

The principal defects in raw cocoa recognized in these commercial classifications are as follows:—

- (1) mouldiness, resulting from excessive internal moisture, which in its turn may be due either to insufficient drying of the cocoa, or to prolonged wetting after the bean has been dried;
- (2) "slatiness" of colour in the interior of the bean, due to harvesting of immature pods, and inefficient fermentation;
- (3) weevil and moth attack;
- (4) germination due to pods being over-ripe when harvested or neglect in process of fermentation.
- (5) other defects, such as broken or undeveloped beans and presence of foreign matter.

The grades vary in different markets. In Liverpool contracts there are five clauses, embracing three main classifications:—

Clause A, not more than 5 per cent. slaty nor 5 per cent. other defects, with the right to reject sub-standard cocoa.

Clause B, the same standard, but a fair allowance to be made for additional defects.

Clause C, not more than 10 per cent. slaty nor 12 per cent. other defects, with right to reject.

Clause D, the same standard, but with the allowance as in *Clause B*.

Clause E, not more than 12 per cent. all defects, but no standard of fermentation required.

"Good Fermented" falls under *Clause B*, "Accra Fair Fermented" under *Clause D*, and "Lagos Fair Average Quality" under *Clause E*. In London contracts the maximum for "other defects" under *Clauses C and D* is 10 per cent. instead of 12 per cent.

There has been a tendency in recent years for the prices of fine and common cocoa to approach closer to one another. This is due partly to an improvement in the quality of common West African cocoa and partly to improvements in the process of manufacture which have made it possible to reduce the proportion of fine cocoa in the finished product.

World production and consumption.

Cocoa has now been used as the raw material for the manufacture of chocolate, cocoa powder, and other foodstuffs for very many years, but the trade did not become an important one until the second half of the nineteenth century, and, as the statistics indicate, the production and consumption of cocoa have increased enormously during the last 40 years.

Accurate figures of world production are not available, but the following figures, based mainly on statistics published in the *Gordian*, the recognized trade paper for cocoa, give sufficient indication of the trend of production in the last 40 years.

	Metric tons.	Average of three years ending—	Metric tons.
1895	76,933	1927	487,054
1905	144,481	1930	512,109
1915	294,777	1931	522,893
1925	497,019	1932	534,204
		1933	560,159
		1934	590,000

Table II* gives more detailed figures for production during the last seven crop years (ending 30th September).

It will be observed that production has shown a steady increase, with a tendency for the percentage rate of increase to fall.

Figures of consumption are still more difficult to obtain, but the following figures obtained from the same source indicate the general trend:—

	Metric tons.	Crop year—	Metric tons.
1895	73,352	1927-28	481,700
1905	143,571	1930-31	533,400
1915	316,897	1931-32	518,300
1925	484,903	1932-33	512,100
		1933-34	541,000

Table III† gives more detailed figures for consumption during the last seven crop years.

In comparing these figures with those of production, allowance must be made for loss by shrinkage, etc., amounting to about 1½ per cent.

These figures also show a steady increase up to the most recent years, during which the rate of increase has fallen away sharply. During the same period there has undoubtedly been some increase in stocks, although this was comparatively small in 1934. The figures were carefully examined in connexion with suggested schemes for the regulation of the supply of cocoa and in a memorandum forwarded by His Majesty's Government in the United Kingdom to the Bureau of the Monetary and Economic Conference in 1934 the conclusion is advanced that stocks at the end of the crop year 1932-33 were 158,000 tons in excess of "normal" stocks existing in September, 1926.

* See page 535.

† See page 535.

In the memorandum in question it is suggested that the figures summarized above afford evidence of a state of over production which, while it may not have reached very serious dimensions at present, gives cause for uneasiness as to the future, as there is little indication that the rate of increase in world production is likely to fall off.

As far as the crop year 1933-34 was concerned the situation improved somewhat. For the first time for a number of years the quantity consumed exceeded the quantity produced, and, in the calendar year 1934, as far as a final estimation is possible, consumption equalled exports. On the basis of actual production during 1934, however, there will probably prove to have been a balance of between 10,000 and 15,000 tons more produced than consumed. This surplus is very small when compared with the previous year, especially if the large yields of the 1934 main crops are taken into consideration.

The following table is taken from the *Gordian* of 22nd December, 1934, and shows the quantity of production, less loss of weight, the world consumption and the increase in visible stocks since the low level at the end of 1926.

Year.	Crop.	Consumption.	Surplus.	Increase of stocks since December, 1926.
	Tons.	Tons.	Tons.	Tons.
1927 ...	499,000	452,000	+47,000	47,000
1928 ...	529,000	499,000	+30,000	77,000
1929 ...	522,000	516,000	+ 6,000	83,000
1930 ...	510,000	508,000	+ 2,000	85,000
1931 ...	529,000	540,000	-11,000	74,000
1932 ...	577,000	515,000	+62,000	136,000
1933 ...	577,000	535,000	+42,000	178,000
1934 ...	595,000	583,000	+12,000	190,000

Production in the Colonial Empire.

Complete statistics of all cocoa exports from the Colonial Empire during the years 1930-33 are contained in Table IV.*

It will be seen that about 60 per cent. of the whole world crop is produced within the Colonial Empire and that the total value of exports from the Colonial Empire has dropped from nearly £10½ million in 1930 to nearly £7 million in 1933.

Cocoa is the principal export of the Gold Coast and Grenada, where in 1933 it represented about 64 per cent. and 57 per cent. respectively of the total domestic exports. In Nigeria and Trinidad, cocoa is a substantial export but not of absolutely first-rate importance. In Jamaica, Ceylon, and other Dependencies cocoa is only of minor importance.

As regards the future, so far as the Colonial Empire is concerned it is anticipated that some small increase above the crop for 1932-33 may still take place during the next few years in the Gold Coast, but over a period of years it is unlikely to reach the rate of 1 per cent. per annum, and in 1933-34 there was an actual decrease of 36,000 tons below the figures for the preceding year. The estimated crop for 1934-35 is 260,000 tons for the main crop, with an additional 15,000 tons or so for the mid-crop.

In Nigeria, there is some land suitable for cocoa cultivation which is not so employed and some increase is still probable; it is difficult to state an exact figure, but given a reasonably remunerative, but not a very high, price for cocoa the increase, in the absence of any action by the Government, is unlikely to be less than 2,000 tons or more than 3,000 tons annually. In both West African territories young areas under cocoa are, when prices are high, reasonably well cultivated, and no material decrease in production from the older areas planted on suitable soils is to be anticipated.

In the British West Indies no further considerable expansion is possible.

COFFEE.

Varieties, Method of Production, etc.

There are three varieties of coffee of major importance, viz., *Arabica*, *Robusta*, and *Liberica*, and one or two less important varieties such as the *Stenophylla* of Sierra Leone, and *Excelsa* which is now being tested in certain Colonies.

Arabica coffee came originally from the mountains of Abyssinia, *Robusta* coffee from the Congo, and *Liberica* from the forests of West Africa. The species *Stenophylla* is the highland coffee of Sierra Leone.

In quality *Arabica*, which thrives best at elevations between 2,000 and 5,000 feet above sea level, is by far the best and the most widely cultivated, but it is the most delicate and requires certain classes of soil and careful cultivation, if it is to succeed.

Robusta and *Liberica* are grown from sea level to elevations of 2,000 feet or over; they are both hardier and on the whole give larger yields than *Arabica* and can be grown on soils on which *Arabica* does not thrive. *Robusta* is superior in quality to *Liberica* which is consumed almost exclusively in Northern Europe.

The whole subject of the growth and marketing of coffee, which is an exceedingly intricate one, is discussed in detail in the 19th Report of the Imperial Economic Committee ("Coffee," June, 1931), from which much of the information in this memorandum is extracted.

The coffee tree is a fruit-bearing tree and the coffee bean is the prepared seed of the fruit or berry. The fruits or berries, consisting of the beans surrounded by the pulp, are sometimes known as "cherries." Each fruit normally contains two beans, but when only one bean develops it is known as "peaberry."

* See page 536.

Arabica coffee normally yields in the third year and under favourable conditions may produce good crops in the fifth year. *Robusta* coffee reaches maturity in about the same time as *Arabica*, but *Liberica* takes longer to reach the fruiting stage. Like all fruit trees, coffee is liable to very wide variations in yield from one season to another. A yield of 5 to 7 cwt. per acre is considered good for *Arabica*, but over a series of years the average for well-matured plantations is considerably less, and in exceptional seasons it may be considerably more. *Robusta* yields crops almost double those from *Arabica*, and *Liberica* is an even much more prolific yielder.

The berries when ripe are plucked from the trees. They are then transported to the pulping machine, which removes the pulp from the berry. The beans with their mucilaginous covering are then fermented. After fermentation they are washed and dried. In Tanganyika Territory, an installation for the removal of the mucilaginous covering by means of water under pressure has given satisfactory results and a high grade product is being turned out without recourse to fermentation. All the processes are performed at or near the plantation and the resultant product is "parchment coffee." The "hulling" or "curing" to remove the parchment is performed sometimes before and sometimes after shipping to the oversea markets.

The cleaned beans are sold in due course to wholesalers, and the roasting is performed either by the wholesalers or by the retailers to whom they pass. Finally the roasted beans are ground either by the retailer or by the ultimate consumer. The quality of the final product depends not only on the quality of the bean itself and on the skill with which it is roasted, but also on the shortness of the period between roasting, grinding, and final consumption.

Market Grades.

The world supply is divided into two distinct classes, Brazilian coffee, which is coarse and strong, largely favoured on the Continent of Europe and in the United States and generally sold mixed with chicory, and the "mild" coffees which are chiefly favoured by consumers in the United Kingdom and are mixed with little, if any, chicory.

The market grades of coffee are in most cases called by geographical designations followed by an indication of the quality and size.

Brazilian coffee, being a bulk crop which is sold by sample and on description, is elaborately classified into some eight or nine "types" according to the number of "defects" (that is broken, defective, insect damaged, chipped, black and discoloured beans and pods, husks, and other foreign material) in a sample of given weight. (For instance the standard Santos Type No. 4 is allowed up to 30 "defects" in a sample of 450 grammes) Colonial and other mild coffees are usually divided into three quality grades: Fine, fair to good, and ordinary.

As regards size, the beans of mild coffees, after "curing" are usually sorted through sieves or "screens" into several sizes. The following are the usual size names on the London market--the terms varying with the country of origin:—

- (1) Elephants or oversize.
- (2) A, bold or No. 1.
- (3) B, medium or No. 2.
- (4) C, thirds or No. 3.
- (5) Triage, or Chips, i.e., broken beans.
- (6) Peaberry.

(The peaberry, being elliptical instead of flat on one side, rolls easily in the roasting machine and roasts more evenly than the ordinary bean. It may therefore command a high price in spite of its small size.)

In certain cases other grades are recognized and sometimes laid down by law.

In Tanganyika Territory, for instance, Bukoba coffee is divided into two classes "Plantation," that is *Arabica* coffee grown by Europeans, and "Native" that is *Robusta* coffee grown by natives. Each class is further subdivided into two grades, G.A.Q. (Good Average Quality) containing not more than one defective bean in ten and no extraneous matter, and F.A.Q. (Fair Average Quality) containing not more than 10 per cent. by weight of defective beans (equivalent to about 27 defective beans in every 100) or 1 per cent. of extraneous matter.

A further grade of Triage is also recognized for this coffee.

World production and consumption.

An overwhelming proportion of the coffee lands of the world are in South and Central America and the non-British West Indies. The Netherlands East Indies, British East Africa, and India are the only other countries where there are now considerable areas under coffee. In Jamaica is produced the high-grade Blue Mountain coffee, and small areas are also under coffee in certain of the British West Indies.

Accurate and complete statistics of acreage under coffee are not available, but broadly speaking it is estimated that the total world-area under coffee is between 11 and 12 million acres, of which Brazil accounts for between 7 and 8 million, the rest of America and the non-British West Indies for about 2½ million, and the Colonial Empire for about 200,000 acres or 2 per cent. of the whole. (The exact acreage under coffee in India and the Netherlands East Indies is not known but it is probably in the neighbourhood of 250,000 acres in India, while in the Netherlands East Indies, the area of the European plantations is estimated to be about 300,000 acres out of a total area of 600,000 acres.)

Owing to the great variations of yield from year to year it is difficult to state what the "normal" annual world-production of coffee is, or what the "normal" share of each area in that total is. Some indication of the difficulty is given by the fact that the Brazilian crop for 1933-34 (about 860,000 tons) was under half the crop for the previous year (about 1,777,000 tons). It would perhaps in these circumstances be not unreasonable to take the average of the four seasons 1930-31 to 1933-34 as some guide to normal production. The average total annual production during that period was about 2,137,000 tons with a maximum of 2,608,000 tons and a minimum of 1,600,000 tons, of which Brazil contributed 1,369,000 tons (1,777,000 and 860,000) the rest of America and the non-British West Indies about 250,000 tons (307,000 and 297,000), and the Netherlands East Indies about 109,000 tons (133,000 and 95,000).

It will be seen, therefore, that the Colonial Empire contributes less than 2 per cent. of the world-production with a maximum of about $2\frac{1}{2}$ and a minimum of about $1\frac{1}{2}$ per cent., while the total production of the Empire is only about 3 per cent. of world-production.

No estimate of the value of the total production of the Colonial Empire can be made, but exports have averaged rather under £2,000,000 annually in recent years, varying between a minimum of nearly £1,600,000 in 1931 and a maximum of not far short of £2,200,000 in 1930 and 1932.

Consumption is, of course, much more constant than production. By far the largest consuming country in the world is the United States of America which imported over 700,000 tons in each of the years 1930-33. France comes next with an average over the same period of 186,000 tons and then Germany with an average of 140,000 tons. Belgium in 1931 and in 1932, and the Netherlands in 1933, imported over 50,000 tons, but no other country imports as much as that amount.

The United Kingdom is an important market for "mild" coffees and over two-thirds of the total East African crop and the best kinds of British West Indian coffee come to the United Kingdom market, although a substantial proportion is re-exported. Imports average about 33,000 tons annually, of which only about half is retained, the remainder being re-exported. Consumption *per caput* is, therefore, very small, only about 12 ounces *per annum* as against $9\frac{1}{4}$ lb. of tea. The retained coffee is almost all "mild" coffee and up to 1932 inclusive less than half of it was of Empire origin. In 1933, however, more than half the retained coffee was of Empire origin. There is, therefore, a tendency towards retaining more and more coffee of Empire origin at the expense of the competing foreign coffees, the most important of which is that from Costa Rica. The United Kingdom duties on coffee are now $\frac{1}{2}$ d. per lb. preferential and $1\frac{1}{2}$ d. per lb. general.

Both Canada and the Union of South Africa import 12,000 to 15,000 tons annually, *per caput* consumption being appreciably greater than that in the United Kingdom. The greater part of the coffee imported is of Brazilian and similar kinds. There is, however, a tendency towards increased consumption of Colonial *Robusta* sorts instead. Consumption in other parts of the Empire (except India which consumes a good deal of its own coffee) is inconsiderable.

The coffee market has been becoming more and more difficult since the beginning of 1934, owing to the tendency of a number of countries to prohibit the importation of coffee except by barter transactions, and as a result, by the middle of 1935 stocks were accumulating and prices for all except the best qualities were falling.

Colonial production.

The history of coffee-growing in the Colonial Empire has been one of extraordinary vicissitudes. The crop was established in Jamaica more than 200 years ago, and in the early years of the 19th century the annual output of Jamaica, Dominica, Trinidad, and British Guiana reached a maximum of 20,000 tons. In 1933, it was rather more than 5,000 tons. In 1875, Ceylon reached a peak of 50,000 tons, but the plantations were devastated by the coffee leaf disease (*Hemileia vastatrix*), and the production is now only 5 or 6 tons annually, while exports in 1933 were less than half a ton.

Towards the end of the 19th century, Malaya developed a production of about 6,000 tons annually of *Liberica* coffee, but the greater part of it was replaced by rubber, and there is now only a small production for local consumption which is supplemented by imports of several thousand tons annually from the Netherlands East Indies. It is probable that the soil of Malaya is too acid for *Arabica* coffee, and that *Robusta* and *Liberica* are the most suitable varieties for this area.

Coffee now occupies about 1,200 acres in the Straits Settlements, rather over 6,000 acres in the Federated Malay States and small areas in Johore, Kedah, and Perlis.

The present century, however, has seen the establishment of large plantations in the East African Dependencies.

Coffee is now by far the most important product for the export market in Kenya, being five times as important, from the point of view of value, as any other export product. In Uganda it is the second most important product, but less than one-fifth the value of cotton, the most important export product. In Tanganyika Territory also it is the second most important export product, but represents less than half the value of sisal.

Even in East Africa, however, the history is not one of continuous progress. Nyasaland reached a peak of 17,000 acres with an annual production of 2,000,000 lb. in 1900, but by 1933 the area had shrunk to 1,210 acres and exports to less than 20 tons.

In Northern Rhodesia the industry is only a very small one and still in the experimental stage. In West Africa (the Gold Coast, Sierra Leone, and Nigeria), coffee is only of trivial importance.

In St. Helena coffee has been grown experimentally and its cultivation may be possible in some of the sheltered valleys where the rainfall is adequate.

In Mauritius and the Seychelles cultivation is still in the experimental stage.

In the British West Indies, coffee still retains a position, though rather a minor one. The principal export market is Canada. Jamaica still produces "Blue Mountain," an *Arabica* variety universally recognized as the finest coffee in the world, but the total area under coffee in the Colony is only 6,000 acres of which only a very limited highland area produces Blue Mountain coffee. Other Jamaica coffee is of a rather low quality.

In Trinidad coffee has been grown for 150 years but at the beginning of the present century had almost disappeared. Interest has now, however, revived. Exports now average about 300 tons a year and could be increased. *Robusta* is growing well, and *Excelsa* is being tried in the dry areas.

In Dominica which produced 2,000 tons annually at the end of the 18th century, production is now hardly more than experimental and exports are less than a ton annually.

In Grenada and St. Lucia coffee has never been important, but there has recently been some planting, chiefly of *Robusta*.

In British Guiana coffee-growing is still of some importance in certain areas. Exports average about 360 tons a year and, the variety grown being *Liberica*, go chiefly to Scandinavia and the Netherlands, the chief markets for that variety.

In Fiji coffee was formerly an important industry, but was almost completely destroyed by coffee leaf disease, and there have been no recent signs of revival. A certain amount of coffee is, however, grown in the New Hebrides.

As regards the quality of Colonial coffees, Jamaica Blue Mountain is far ahead of the rest.

Next come the *Arabica* coffees grown in Kenya, Tanganyika Territory, and Uganda, that from Uganda commanding somewhat lower prices than the others.

Next come the West Indian *Robusta* coffees and, a little below them, the African *Robustas* and, last of all the *Libericas*.

Table V* shows the total exports of coffee from all parts of the Colonial Empire during the years 1930 to 1933. Exports from Somaliland and Malaya have been omitted since they are not of domestic origin. It will be seen that the value of exports of coffee from the Colonial Empire has decreased slightly since 1930 although the quantity exported has increased by over 3,000 tons.

COTTON.

Varieties, Methods of Cultivation, etc.

Cotton, the most important of vegetable fibres, is one of the greatest export crops in the world.

It is derived from several widely different species of the genus *Gossypium*. The plant is actually a perennial, but in nearly every case as a crop it is cultivated as an annual. A few kinds, however, including the *Marie Galante* in certain West Indian islands, are grown as perennials.

The cotton fruits or seed pods, which are known as "bolls," on reaching maturity burst open disclosing the "seed cotton," which consists of the seeds to which the cotton fibres are attached. This seed cotton is picked by hand and, after being sorted for the removal of stained cotton, is sent to the ginnery to be cleaned from any chance leaf refuse and then ginned, that is subjected to a process by which the fibre, known as "cotton lint," is separated from the seed. The cotton seed is an important member of the large group of oil seeds, and further particulars will be found in the Memorandum† under that heading. As a rough general rule it can be taken that seed cotton yields 33 per cent. of its weight in lint, but in some cases the proportion may be as low as 25 per cent. and in others as high as 50 per cent.

The cotton lint is packed in bales and is ready for export to the consuming countries where it is spun into thread or put to other uses. The weight of the bales varies in different countries. The standard bale throughout the British Empire is 400 lb., the United States bale is 480 lb., and the Egyptian bale is 750 lb. In South America, Russia, and Persia the bale is usually about 250 lb. For comparative statistical purposes all these are sometimes converted into a statistical bale of 500 lb.

Sorts and Market Grades.

The quality of the cotton, and consequently its value, depends principally on the length of the "staple," that is the individual fibre, which varies greatly according to the species of *Gossypium* from which it is derived.

The various kinds of cotton are divided into three main classes according to their staple lengths and graded into a number of grades according to the Universal Standard, which is as follows:—Middling fair, strict good middling, good middling, strict middling, middling, strict low middling, low middling, strict good ordinary, good ordinary.

The finest cotton is the Sea Island which is grown almost exclusively in certain British West Indian islands and has a staple of from 1½ to 2½ inches. Three grades of West Indian Sea Island cotton are recognized, Extra Superfine, grown in St. Vincent, with a staple of 2½ inches, Superfine, grown in St. Kitts and Barbados, with a staple of 2 inches, and Ordinary, grown in the other islands with a staple of 1½ inches. Small quantities of Sea Island are also grown in Fiji.

The other principal variety in the Fine Class is Egyptian cotton of which the better sorts, Sakellarides and the like, have a staple of 1½ to 1¾ inches and the inferior sorts, Ashmouni and the like, a staple of 1½ to 1½ inches.

At the bottom of the Fine Class come American Long Staple, certain South American cottons and Uganda cotton, which has a staple of up to 1½ inches.

The principal variety in the Medium Class is United States Upland cotton, which represents rather more than half the world crop and has a staple of from 1 to 1½ inch. Other varieties in this group are Nigerian cotton with a staple of 1 to 1½ inch and Indian Long Staple cotton with a staple of ¾ to 1 inch.

The principal varieties in the Short Staple Class are Indian and Chinese cotton with a staple of ¾ to ¾ of an inch.

World Production.

The total area under cotton is not precisely known. Apart from the doubt regarding the precise area under cotton in such countries as Nigeria, where production cannot in any case be really important, there is a major element of doubt in the case of China, where it is known that there are at least 5 million acres, and it is believed that there may be as much as 10 million acres, under cotton.

It is estimated, assuming the higher figure for China to be correct, that in the years 1930-31 to 1933-34 inclusive the area under cotton varied between 80 and 90 million acres, of which between 30 and 43 million acres were in the United States of America and between 23 and 24 million

* See page 537.

† See page 498.

acres in India. It is unlikely that until recently the area under cotton in the Colonial Empire reached a million acres. In view of the recent increase in Uganda it may now amount to as much as a million and a-quarter acres. The acreage under cotton in the United States of America has been deliberately restricted by governmental action in the most recent years.

World supplies of cotton vary very greatly from year to year owing to fluctuations in the area sown, in the yield and in the incidence of disease, as the following table shows:—

World's Cotton Crops.

(Extracted from the *Empire Cotton Growing Review*, January, 1935.)
(Bales of 500 lb.—000's.)

	1929-30	1930-31	1931-32	1932-33	1933-34	1934-35 (Estimates).
U.S.A. Lint	14,825	13,932	17,096	13,002	13,047	9,731
„ Linters	1,241	986	1,067	912	950	990
Total	16,066	14,918	18,163	13,914	13,997	10,631
Mexico	240	174	206	99	220	194
Brazil	564	470	558	396	810	1,200
Peru	266	243	226	234	270	265
Argentina	138	150	165	152	162	160
Other South American	66	52	39	43	51	60
India*	5,243	5,224	4,007	4,656	4,970	5,000
China	2,055	2,317	1,733	2,228	2,700	2,927
Japan and Korea	137	150	98	132	188	200
East Indies, etc.	18	18	15	13	13	15
Russia	1,279	1,589	1,846	1,750	1,890	1,650
Persia	73	72	110	100	100	100
Iraq, Ceylon, etc.	4	3	1	†	†	†
Asia Minor and Europe	143	119	131	68	103	151
Egypt	1,706	1,655	1,271	991	1,715	1,560
Sudan	127	96	188	110	131	135
East Africa (British)... ..	131	166	182	266	252	280
South Africa (British)	14	8	3	2	3	3
West Africa (British)	35	15	5	20	20	20
Non-British Africa	121	128	94	127	150	150
West Indies (British)	4	4	2	2	2	2
West Indies (Others)	25	21	30	26	25	25
Australia, etc.	12	10	4	11	16	16
WORLD'S TOTAL	28,467	27,602	29,077	25,340	27,788	24,724
Production outside the U.S.A.	12,401	12,684	10,914	11,426	13,791	14,093
Per cent. of Total	43·6	46·0	37·5	45·1	49·6	57·0

* Government Estimate, 400 lb. bales.

† Less than 500 bales.

Colonial Production.

Compared to these figures production within the Colonial Empire is very small.

It can conveniently be divided up into four groups:—

- East Africa.
- West Africa.
- West Indies.
- Miscellaneous.

In *East Africa* the principal producing country is Uganda where cotton is the principal export crop. It is produced almost exclusively for export and exports can be taken for practical purposes as equivalent to production. The area under cotton has been expanding steadily from 533,044 acres in 1927-28 to 1,090,816 acres in 1933-34. Production during the seasons 1927-28 to 1931-32 inclusive varied from about 129,000 to 207,000 bales. During the season 1932-33 production reached 295,000 bales, by far the largest crop so far produced. There was a slight reduction, owing to climatic reasons to about 277,000 bales in the 1933-34 season, and it is anticipated that there will be a further slight reduction to about 240,000 bales, owing to the same reasons, in the 1934-35 season. Exports in 1933 were valued at £2,682,210 equivalent to over 77 per cent. of total domestic exports. Almost the whole crop is exported to India for use in that country or re-export to Japan.

In Kenya, there is a small production of cotton in the Kavirondo Native Reserve and in the coastal belt; the amount, although still small, has shown a marked increase during the last two or three years.

In Tanganyika Territory, cotton as a planter's crop has not made great headway, but it still holds an important place as a native crop. It is estimated that in 1933, 133,000 acres were under cotton. Exports in 1933, which can be taken for practical purposes as equivalent to production, were 28,419 bales valued at £276,864, rather less than 9 per cent. of the total value of domestic exports in that year.

Cotton is a crop of increasing importance in Nyasaland, but exports have not yet reached an amount of 10,000 bales a year.

In parts of *West Africa*, unlike East Africa, cotton was in the country before the European and there is an old-established native spinning and weaving industry which provides a market for most of the crop. The amount available for export depends on the relative movements of local and world prices, and also to some extent on the price obtained for exports from the previous crop which tends to influence the amount sown in the next season.

This is particularly true of Nigeria, where cotton is grown to a large extent in the Northern and to a smaller extent in the Southern Provinces. No statistics are available regarding either the total acreage under cotton or the amount consumed by the local spinning industry, though the latter is believed to be fairly considerable. Purchases of cotton for exports in recent seasons have been :—

NORTHERN PROVINCES.

Purchases of American Seed Cotton for Exports expressed as Bales of Lint each 400 lb. nett.

Year.					Cotton Bought. Bales.
1929-30	...	...	...	...	34,389
1930-31	...	...	...	...	13,849
1931-32	...	...	...	...	4,811
1932-33	...	...	...	...	22,228
1933-34	...	...	...	...	22,000*

SOUTHERN PROVINCES.

Purchases of Native and Improved Ishan Cotton for Exports expressed as Bales of Lint each 400 lb. nett.

Year.					Native Cotton. Bales.	Improved Ishan. Bales.
1929-30	...	...	...	...	3,510	6,026
1930-31	...	...	...	...	312	4,289
1931-32	...	...	...	...	4	1,333
1932-33	...	...	...	...	4	860
1933-34	...	...	...	...	—	3,000*

* Estimates subject to slight correction later.

There is still room for further expansion and it is estimated that in favourable circumstances a total export of 70,000 bales annually might be reached, but it is unlikely that this figure would be exceeded. From the export point of view, therefore, the crop will always be a minor one in Nigeria.

In the Gold Coast, the crop is still in the experimental stage.

In Sierra Leone, cotton is grown to a small extent for local use, but attempts to foster the cultivation on a large scale have failed.

In the Gambia, cotton is grown to some extent, but the whole crop is used for the local manufacture of cloth.

In the *West Indies* two kinds of cotton are grown, Sea Island and Marie Galante.

The production of Sea Island cotton is of considerable importance, both because the West Indies are now to all intents and purposes the main source of supply of this superfine cotton and also because it is the principal export of Montserrat and an important export of St. Vincent and St. Kitts-Nevis (including Anguilla).

The average area of land planted with Sea Island cotton in the seasons 1921-22 to 1932-33 inclusive was as follows :—

								Acres.
Barbados	...	...	...	...	...	...	...	1,930
St. Vincent	...	...	...	...	...	...	...	3,263
Montserrat	...	...	...	...	...	...	...	2,774
St. Kitts	...	...	...	...	...	...	...	1,274
Nevis	...	...	...	...	...	...	...	1,644
Anguilla	...	...	...	...	...	...	...	253
Antigua	...	...	...	...	...	...	...	558
								11,696

and the average yield of cotton lint during these years was as follows :—

					lb.	Equivalent to bales.
Barbados	...	...	...	...	198,395	496
St. Vincent	...	...	...	...	376,716	942
Montserrat	...	...	...	...	486,683	1,217
St. Kitts	...	...	...	...	201,829	503
Nevis	...	...	...	...	150,682	377
Anguilla	...	...	...	...	15,926	40
Antigua	...	...	...	...	55,088	138
					1,485,319	3,713

The cost of production is higher than that of American Medium Staple cotton and, although it usually commands a price more than twice that of that grade the general depression reduced prices to a level below that acceptable to the producers, with the result that stocks accumulated and plantings decreased. In 1933, no more than 3,659 acres were planted against the average of 11,696 acres shown above and the estimated production was 579,997 lb. or 1,450 bales against the average of 1,485,319 lb. or 3,713 bales.

The whole situation was discussed at a Conference of the producers held in Trinidad in November, 1933, and it was agreed to form a West Indian Sea Island Cotton Association, to instruct the Association to take steps to increase sales, and to limit production in 1934 to the following amounts:—

	<i>Acres.</i>	<i>lb.</i>	<i>Equivalent to bales.</i>
Barbados	700	70,000	175
St. Vincent	1,200	145,000	362
Montserrat	2,000	360,000	900
St. Kitts	500	78,000	195
Nevis	1,000	100,000	250
Anguilla	100	10,000	25
Antigua	200	24,000	60
	<u>5,700</u>	<u>787,000</u>	<u>1,967</u>

The campaign has been attended with considerable success; prices have been increased to a satisfactory but not excessive degree and stocks have been reduced to such an extent that the Committee found it possible to recommend a substantial increase in production in 1935. A total production of 1,250,000 lb. is aimed at during this year, involving an acreage of about 8,500 acres. The details are as follows:—

<i>Colonies.</i>	<i>Proposed acreage.</i>	<i>Intended production. lb.</i>
Barbados	1,000	100,000
St. Vincent	1,500	150,000
Montserrat	3,500	700,000
St. Kitts	600	120,000
Nevis	1,200	110,000
Anguilla	400	40,000
Antigua	300	30,000

There is also a small production of Sea Island cotton in *Fiji*. Exports, which can be taken as equivalent to production, fluctuated considerably in recent years between a maximum of about 620 bales in 1927 and a minimum of about 120 bales in 1929, but have since almost disappeared.

Marie Galante, a perennial cotton similar to American Middling Upland, is the main export of the Grenadines, but the quantity is relatively small. From 600 to 800 bales have been exported annually during recent years from Carriacou, a small island in the Colony of Grenada, and 90 to 170 bales have also been exported from the Grenadine islands included in the Colony of St. Vincent.

In other parts of the Colonial Empire cotton-production is of very little importance. In Ceylon, there is a small production which is bought by a mill in Colombo. In 1930, 2,297 acres were under cotton, but this area has since been greatly reduced.

In Cyprus there is a small production of cotton of short staple type. Part of it is absorbed in a small local spinning industry and the rest is exported, chiefly to Greece. Exports in 1933 amounted to 1,226 bales valued at £11,724. A similar cotton is grown in Malta on a very small scale, production in 1933 being only about 40 bales.

There is a small production of cotton in the New Hebrides. Exports in 1928 amounted to over 3,500 bales, but dropped to less than one-tenth of that amount in 1933.

Table VI* shows all exports of cotton from the Colonial Empire during recent years. It will be seen that the total value, which was £2½ million in 1930 had increased to a little over £3½ million in 1933 owing to largely increased exports from the East African Dependencies.

ESSENTIAL OILS.

The essential oils, otherwise known as volatile or ethereal oils, are a group of aromatic oily products, generally somewhat costly, which are obtained usually by distillation or expression from certain fruits, flowers, leaves, grasses, barks, roots, and woods. They are used principally as constituents of drugs, perfumes, perfumed soaps, etc., and as food flavourings.

A comparatively small number of essential oils is produced in commercial quantities in the Colonial Empire, and in most cases the Colonial Empire is the only source of supply of the particular oils in question. It is only in rare cases that essential oils are an export of appreciable importance to the Dependencies in which they are produced. Exceptions are the Seychelles, where essential oils are the second most important agricultural export and third most important export of any kind; St. Lucia, where lime-oil is the second most important export; and Dominica, where also lime-oil is of great importance among export products.

Table VII† contains a complete list of all exports from the Colonial Empire during recent years. It can be assumed that these figures will serve equally well to indicate total production, since domestic consumption is negligible.

It will be seen that the total value of exports has dropped from about £276,000 in 1930 to about £232,000 in 1933.

The following is a brief list of those essential oils which are of most importance in the Colonial Empire.

Bay Oil is distilled from the leaves of *Pimenta acris*; its principal use is in perfumery, notably as the basic perfume in bay rum.

* See page 538.

† See page 539.

The British West Indies are the only sources of supply. Dominica produces about five to ten tons a year and St. Lucia about one ton. There is a very small production in Montserrat.

The principal consuming country is the United States of America which takes most of the production.

The present market price (February, 1935) is 4s. 6d. per lb.

Cedarwood oil is derived from two species of juniper. The chief source of supply is Florida where the oil is distilled from *Juniperus virginiana*. The other oil is obtained in Kenya from *Juniperus procera*. Kenya is now exporting about 12 tons annually. At the end of 1934 the two oils were quoted in London at the same price. Present prices (February, 1935) are 1s. 2d. per lb. for the Florida and 1s. 1½d. per lb. for the Kenya oil.

Cinnamon leaf oil is distilled from the leaves of *Cinnamomum zeylanicum*, a native of Ceylon which is also grown in the Seychelles. It is used in medicine, for flavouring and for the extraction of eugenol for the manufacture of vanillin.

The only sources of supply are Ceylon, which produces about 20 to 40 tons a year, and the Seychelles which produce about 50 to 60 tons a year.

The Ceylon oil contains 70 to 80 per cent. of eugenol and is therefore less rich than the Seychelles oil which contains 88 to 90 per cent.

The principal consuming countries are Great Britain and the United States of America, the latter taking almost the whole of the Seychelles production for the manufacture of vanillin.

The price has fluctuated considerably in recent years. Early in 1929 the Ceylon oil stood at 7s. per lb. and the Seychelles oil at 6s. 11d. The present prices (February, 1935) are 2s. 4d. to 2s. 7d. per lb.

Cinnamon bark oil is distilled from the bark of *Cinnamomum zeylanicum* and is used for flavouring and medicinal purposes.

Ceylon is the only source of supply in commercial quantities, but the Seychelles have recently resumed production on a modest scale.

A certain amount of cinnamon bark oil is distilled in England from imported bark.

Owing to the high cost of the oil it has been largely replaced by Chinese cassia oil distilled from the leaves and twigs of *Cinnamomum cassia*, and by synthetic cinnamic aldehyde; thus the demand for this oil is only small and the sale limited. The Ceylon oil has not a high reputation as it is frequently adulterated with cinnamon leaf oil. Prices at the present time (February, 1935) are 25s. to 45s. per lb.

Citronella oil is regarded by the trade as being of two kinds, Ceylon citronella oil and Java citronella oil.

The Ceylon oil is distilled from *Cymbopogon Nardus* or Lenabatu grass, which grows in south Ceylon. Its chief use is for perfuming cheap soaps and for anti-fly preparations, and also as a cheap source of geraniol and citronellal.

Ceylon is the only source of supply and annual exports average between 550 and 600 tons.

There are two crops, the greater in May and June and the lesser in November and December, but very limited production is carried on throughout the year and supplies come forward more or less continuously.

Nearly all the Ceylon oil is adulterated with a small percentage of kerosene. Pure oil is sold in small quantities under the description of "estate quality". Further particulars regarding production will be found in the memorandum on Ceylon* in Part I of this volume.

The United States of America and Great Britain are the principal consuming countries, the former taking about 45 per cent. and the latter about 25 per cent. of the total production.

Java citronella oil, which is distilled from what is believed by some authorities to be a different grass, is superior to the Ceylon oil and is put to wider uses and its price is usually 50 per cent. higher. Exports from Java during 1933 and 1934 were 1,524 and 1,783 metric tons respectively.

The price of Ceylon oil at the present time (February, 1935) is 1s. 2d. per lb.

Estate quality oil commands a premium of about 1½d. to 2d. per lb.

Clove oil is sometimes produced in negligible quantities in the Seychelles. Very large quantities of this oil are produced in Madagascar and it will shortly be produced in Zanzibar. It is also distilled in the importing countries from imported cloves.

Its principal use is for the extraction of eugenol for the manufacture of vanillin and for flavouring purposes, and it is also used in perfumery and medicine.

The principal markets are England, France, Germany, and the United States of America.

Madagascar clove oil, containing 85 per cent. eugenol, is worth 3s. 6d. per lb. duty paid on the London market at the present time (February, 1935). There are three sorts of clove oil, differing slightly in their characteristics, clove bud oil, clove stem oil, and clove leaf oil. The last of these is produced only in Madagascar.

Geranium oil, which is distilled from the leaves and stems of various species of *pelargonium*, notably from *pelargonium graveolens*, is widely used in the perfumery and soap trades and for the extraction of geraniol.

The best qualities of this oil have hitherto been produced in France, Algeria, and Bourbon (Réunion). Production was recently started in Kenya of a markedly inferior oil known locally as *Mawah* oil, but better varieties of *pelargonium* have now been obtained and there is every prospect of a considerable development in the production of a fine oil at competitive prices with foreign oils.

The present production of fine oil in the Colony is at the rate of 2 tons a year and this will increase to 10 tons in 1935.

Experimental work on the production of a similar oil in Tanganyika Territory, and of *Mawah* oil in Uganda, has recently been started.

* See page 157.

The principal markets for geranium oil are in London, Marseilles, and New York.

The London prices at the present time (February, 1935) are:—

- Mawah oil 9s. per lb.;
- Algerian geranium oil 24s. per lb.;
- Bourbon geranium oil 21s. per lb.;
- Kenya geranium oil 18s. 9d. per lb.

Lemon-grass oil is distilled from *Cymbopogon flexuosus* and *Cymbopogon citratus*. It is widely used in the soap and perfumery trades and for the extraction of citral.

The chief sources of supply are Cochin (in South India) and French Indo-China, but these two oils are not identical.

Very small quantities used to be produced in the British West Indies and the Seychelles, but supplies from these sources have now ceased.

In Kenya and Uganda, production is still in the experimental stage.

London and New York are the principal markets.

Cochin lemon-grass oil, which is sold with a guaranteed minimum content of 75 per cent. citral is worth 3s. 8d. per lb. on the London market at the present time (February, 1935).

Lime oil is produced from the fruits of the *Citrus medica* var. *acida* by two processes, the *écuelle* process or "hand pressure" and distillation.

Lime oil is principally used for flavouring purposes, but some is used in the perfumery trade.

The main source of the oil in commercial quantities is the British West Indies, in particular Dominica, Grenada, St. Lucia, and Trinidad, but production has also recently been started in the Gold Coast and Northern Rhodesia.

In 1933, the total production of the West Indies was just over 20 tons but the average production for 1929-32 was about 25 tons.

The chief consuming countries are the United States of America and the United Kingdom, the former taking about two-thirds of the production.

The price of distilled lime oil has varied enormously. At the end of 1922 it was no more than 2s. per lb.; in September, 1931, it rose to a peak of 42s. 6d. It then fell by the end of the year to about 35s., at which figure it remained fairly steadily throughout 1932 and part of 1933. The price at the present time (February, 1935) is 23s. 6d. per lb.

Hand-pressed lime oil is worth 20 to 50 per cent. more than the distilled, according to supplies, which are irregular. The present quotation is 37s. 6d. per lb.

Orange oil is produced from the skin of the ordinary orange. The only existing source of any substantial importance in the Colonial Empire is Jamaica, which exports quantities of some importance (6,690 gallons valued at £9,357 in 1933). There is a good deal of competition from foreign sources particularly French West Africa, a new but very low-cost producer. The present price (February, 1935) is about 4s. 3d. per lb.

Patchouli oil is obtained by the distillation of the leaves of *Pogostemon Patchouli*, and of the Java species *P. Heyneanus*, both wild and cultivated plants being used. It is used in perfumery and for scenting soap.

The principal sources of supply are Malaya (round Penang), the Seychelles and Java.

The average export from Penang is about 25 tons annually and that from the Seychelles about two tons. No figures for exports from Java are available.

The oils from the three sources are distinguishable. The Penang oil is of the highest quality and in most general demand. The Seychelles oil is inferior but gaining in popularity and the gap between the prices of Penang and Seychelles oil is tending to close. The Java oil is also inferior. It is sold chiefly on the Continent and does not compete seriously with the Empire oils.

There is some experimental production of patchouli oil in Uganda and the Tanganyika Territory, but it is not yet possible to say whether the industry will be developed.

Of the Penang oil about 50 per cent. of the production goes to the Continent (chiefly France), about 20 per cent. to the United Kingdom, about 18 per cent. to Japan and about 12 per cent. to the United States of America.

About 75 per cent. of the Seychelles oil goes to the United Kingdom, some of it being re-exported to the United States of America and the rest goes to France.

Prices have varied enormously. In 1918, Penang oil went to a peak of 145s. per lb.; by 1925 it had dropped to 13s. and by the end of 1926 risen again to 48s. It has since steadily declined and now (February, 1935) stands at 10s. per lb.

The price of the Seychelles oil depends on that of the Penang oil; it now stands at 6s. 6d. per lb.

Pimento oil is of two kinds, distilled respectively from the berries and the leaf of *Pimenta officinalis*. Both oils are rich in eugenol and are used for flavouring purposes in the confectionery trade.

Jamaica is the only source of supply of pimento, and the only producer of pimento leaf oil, of which the United Kingdom and the United States of America are the chief markets.

The leaf oil is priced at 2s. 6d. per lb. at the present time (February, 1935) and the berry oil at about 10s. per lb.

All the berry oil sold on the market is either distilled in England or leaf oil "faked" on the Continent. The demand is small.

The above are the only essential oils produced in commercial quantities within the Colonial Empire at the present time, apart from small quantities of *Ocimum basilicum* oil exported more or less regularly from Seychelles and rose oil of which small quantities are exported from Cyprus from time to time. In the memoranda in Part I mention will be found of the following essential oils and essential oil plants which are known to exist but are not at present being exploited or at most are only the subject of experiments:—*Ecuelled bitter orange* (Tanganyika Territory); *Eucalyptus* (Kenya); *Ginger grass* (Seychelles); *Ocimum viride* (Seychelles); *Palmarosa* (Seychelles); *Peppermint* (Kenya, Tanganyika Territory, Seychelles); *Petit grain* (Tanganyika Territory) and *Neroli* (Tanganyika Territory).

FIBRES (OTHER THAN COTTON).

Fibres fall roughly into two classes :—(a) the soft fibres derived from plant stems and (b) the hard fibres derived from leaves. They may be spun and used for the manufacture of textile materials, rope, cordage, string, and similar articles or they may be used in their natural state.

Soft Fibres.

The principal soft fibres, other than cotton, which stands in a class by itself and is the subject of a special memorandum, are **flax** (*Linum usitatissimum*), which is the raw material used for the manufacture of linen and canvas, **true hemp** (*Cannabis sativa*) which is now used principally for the manufacture of soft pliable ropes and string and, to a small extent, canvas, **Indian jute** (*Corchorus capsularis* and *C. olitorius*) which is used mainly for the manufacture of canvas and gunny and **Indian sunn hemp** (*Crotolaria juncea*), which is not a true hemp but has similar characteristics and uses.

None of these fibres are produced to any substantial extent in the Colonial Empire.

There is a small production of flax and true hemp in Cyprus, both for local use and for export, 2,015 acres being returned as under the former crop and about 150 acres under the latter in 1933.

Of jute, it is only necessary to say that it is produced almost exclusively in India and that until recently it was the only fibre used in the manufacture of the bags, sacks, and bale covers used for the export of Colonial produce, but that experiments are now being made with the object of substituting sisal and Mauritius hemp for this purpose, at any rate in those Dependencies where those fibres are produced.

Sunn hemp is grown to a small extent for local use in Ceylon, and has been grown experimentally on a small scale in Uganda and other Dependencies.

Hard Fibres.

The hard fibres constitute a group produced both within and without the Empire and used principally for the manufacture of ropes and cordage, marine and other, binder-twine, other twines and string, sacking and other coarse textiles and occasionally the foundations upon which carpets are woven.

Of the fibres which fall in this group it is usual in commercial practice to class manilla hemp, sisal, New Zealand hemp, and Mauritius hemp together as the hemp fibres, since, except Mauritius hemp, they are to a large extent interchangeable. Jute is to some extent interchangeable with the hemp fibres for certain uses.

Coir or coconut fibre stands rather apart and is not interchangeable to any substantial extent with the fibres previously mentioned. It is spun into yarns which are used for weaving into matting and for ropes of special resiliency employed for towing purposes and for ships' fenders. For certain uses it is used in the natural state without spinning.

Although the "hemp fibres" are all more or less competitive both *inter se* and with true hemp they are botanically of very various origins.

Manila hemp (*Musa textilis*) or Abaca is a fruitless banana. The fibre is contained in the leaf bases wrapped tightly round one another to form the stem of the plant, which on reaching maturity is about 9 inches in diameter and 20 feet high. When the plant is two or three years old, the stem is cut down, the leaves stripped off and the fibre, which represents only 1½ to 2 per cent. by weight of the plant, is freed from the vegetable matter, usually by hand with the aid of a knife and a block of wood, but latterly in the Davao district also by decorticating machinery. Almost all the supplies of manila hemp are produced in the Philippine Islands, but there is now some production (about 10,000 tons a year) in Sumatra.

There is a most elaborate system of grading under Government control, some 25 different grades being recognized apart from tow and waste. The grade J.2 is a more or less medium grade generally used for comparisons of price with the other hard fibres to which it is more or less comparable in quality.

Sisal, and the almost identical foreign fibres **henequen** and **maguey** or **cantala**, are prepared from the leaves of various species of *Agave*, which are indigenous in Mexico but have been introduced into other countries.

The fibre, which varies in length from 2½ to 5 feet and is nearly white or pale yellow, is contained in the long rigid fleshy leaves and is extracted from the severed leaves by mechanical decorticators. (Extraction by hand after retting, which was formerly practised, has now almost entirely disappeared.) The fibre represents about 3 per cent. by weight of the severed leaves. After being extracted the fibres are brushed by machinery, carefully graded, and packed in bales for export.

The shorter fibres which are removed in the brushing operation are exported separately as "tow."

Sisal, in the strict sense of the word, is produced from the *Agave rigida* var. *sisalana* in East Africa, the British West Indies, the Netherlands East Indies, and Mexico.

Henequen is produced in Mexico principally from the *Agave fourcroides*, but all the fibres produced in Mexico, except those named *Istle* and *Tula*, which are produced from different varieties of *Agave*, are classified as henequen irrespective of the particular species of *Agave* employed.

The fibre known as **Maguey** in the Philippines is produced from the *Agave cantala* retted in sea water; in the Netherlands East Indies the fibre produced from the *Agave cantala* is the finest and whitest variety of sisal.

African sisal is graded as No. 1, No. 2, and No. 3 with one or two grades of tow. At present there is a difference of about 10s. to £1 per ton between each grade of fibre, and tow sells at a discount of about £4 per ton on No. 3 grade. As will be seen from the table below, showing the annual average prices of African No. 1 sisal and J.2 Manila during the past four years, there is no constant relation between the prices of these two fibres.

	1931.	1932.	1933.	1934.
	£	£	£	£
African No. 1	16	15	16.5	15.5
J2 Manila (U.K. Grade) ...	18.75	18.5	15.75	14.875

Mexican henequen is sold as a single grade priced in cents, United States currency, c.i.f. New Orleans or Atlantic ports.

Maguey is produced in the areas of Cebu and Manila, and each fibre is classed into 3 grades, Cebu (or Manila) Maguey No. 1, No. 2, and No. 3. Prices during recent months have been £3 to £4 per ton below the African sisal grades similarly numbered.

Java and Sumatra sisal is graded "A," "B," etc., and sold in terms of Dutch currency per 100 kilograms. Cantala is sold under that name and not as a sisal.

New Zealand hemp is prepared from the leaves of *Phormium tenax*, a plant indigenous to New Zealand and introduced from there into many parts of the world as an ornamental garden plant and into St. Helena and the Argentine as an economic plant. The plant has a short central root-stock from which the sword-like leaves (which may be ten or more feet long) grow straight out in a fan shape.

The leaves are severed and decorticated by machinery as in the case of sisal, but the machinery actually used differs widely from that used for sisal and the fibre represents as much as 11 per cent. by weight of the original leaves. The fibre is long and lustrous and its colour varies from white to pale reddish brown.

The grades of New Zealand hemp are:—Superior, Fine, Good fair, High point fair, High fair, Low fair, Common and two or three grades of tow. The High point fair grade has recently commanded a price some 30s. to 40s. per ton above that of J.2 Manila and 5s. to 15s. above that of African sisal No. 1.

Mauritius hemp is prepared from the leaves of several varieties of the *Fourcraea gigantea*, a plant which to the ordinary person is not unlike the *Agave* and is locally known as "aloe." This plant was introduced into the Colony from Central America, originally as an ornamental plant, but now for the most part grows wild. There are two main varieties yielding respectively $2\frac{1}{4}$ per cent. and $1\frac{1}{2}$ per cent. by weight of fibre from the original green leaves. The fibre is generally extracted by means of small raspador machines locally known as "grattes," dried, brushed, and baled in much the same way as sisal.

There are six grades, Extra Prime, Prime, Very Good, Good, Fair, and Common or Raw; the Fair grade usually commands a price some £3 per ton above that of African Sisal No. 1.

Although these fibres are to some extent interchangeable they each have characteristics of their own. Manila is still regarded by most shipowners as superior to the other hard fibres for marine cordage, more particularly because sisal and other ropes are said to absorb water more quickly than manila ropes, to swell more when wet and not to recover their shape when dried. Prolonged experiments, however, conducted by the Imperial Institute and the Admiralty authorities have shown that the superiority of manila has been much exaggerated, and sisal and New Zealand hemp are now being used to an increasing extent in the Royal Navy and in the Mercantile Marine. Sisal has a greater tensile strength than New Zealand hemp.

The following is the estimate of annual production of these fibres during recent years published by the well-known London firm of Wigglesworth and Company.

	1930 Tons	1931 Tons	1932 Tons	1933 Tons	1934 Tons
Manila hemp—					
Philippines	162,000	136,000	112,000	152,625	175,000
Netherland East Indies ...	10,000	10,000	10,000	10,000	5,000
Total	172,000	146,000	122,000	162,625	180,000
Sisal and cantala—					
East Africa	76,000	83,000	85,000	102,000	111,000
French West Africa	...	...	6,000	6,000	10,000
Netherlands East Indies ...	55,000	66,000	70,000	85,000	80,000
West Indies (not British) ...	4,600	6,350	6,000	6,000	10,000
Mexican henequen	104,000	70,000	88,000	93,000	92,000
Philippine maguey	11,450	6,700	4,900	5,760	10,950
Total	251,050	232,050	259,900	297,760	313,950
New Zealand hemp and tow ...	11,650	3,135	4,000	6,400	4,900
Mauritius hemp	1,300	500	500	500	500
Total	12,950	3,635	4,500	6,900	5,400
GRAND TOTAL	436,000	381,685	386,400	467,285	499,350

There are one or two other fibres of minor importance in this group, for example **bow string hemp** (*Sansevieria*) which is produced for local use in Ceylon, but they are of no importance from the point of view of the world trade.

Some years ago attempts were made to produce this fibre on a commercial scale in Kenya, indeed this was to some extent the starting point for sisal, but the fibre is brittle and difficult to sell, and its preparation has been abandoned.

Roselle hemp grows to a limited extent in Malaya.

The production of, and trade in, the hemp fibres formed the subject of a recent publication of the Imperial Economic Committee (Twenty-fourth Report "Hemp fibres" 1932).

Coir is the fibre of the husks of the coconut. It is usually prepared by retting the husks in water for a period of some weeks and then extracting and cleansing the fibre by hand, but mechanical extraction from the husks when green is also well established. The finer fibres are spun into yarn and manufactured into mats, matting, and similar articles and, to a small extent, into cheap ropes and cordage. The coarser fibres or bristles are used for brush-making and similar purposes, and the finer fibres for mattress making in their natural state and without spinning.

The hard fibres are a group of commodities of considerable importance to certain parts of the Colonial Empire.

Sisal is the principal export of Tanganyika Territory. The total value of the exports of hemp and tow in 1933 was over £880,000 or about 33 per cent. of all domestic exports. It is also an important product of Kenya, the value of exports in 1933 being £250,000. In Uganda only a small area is under sisal, about 2,100 acres, and exports in 1933 were negligible. In 1932 10,000 acres in Nyasaland were under sisal but production ceased entirely in 1933. The total area under sisal in East Africa in 1933 was over 410,000 acres. In Sierra Leone production is still only in the experimental stage. A few hundred tons of sisal were formerly exported every year from Ceylon and the Gold Coast, but exports from the former ceased in 1927 and from the latter in 1930.

In the West Indies the industry is now in a very depressed state. There is still a small production in Jamaica, where the fibre is used locally for the manufacture of rope and string. In the Bahamas, where sisal was once the principal industry and it is stated that at one time nearly 100,000 acres were under this crop, and in the Turks and Caicos Islands production has practically ceased.

New Zealand hemp is the only agricultural crop of any economic importance in St. Helena.

Mauritius hemp is only a minor product of Mauritius, annual production during recent years being on an average 500 tons, worth at present prices about £10,000. Part of it is exported and the remainder has recently been used for the local manufacture of sugar bags. The factory was, however, closed at the end of 1934 and has not yet been reopened. There is also a small production for local use in Ceylon.

Coir fibre could theoretically be produced in all those Dependencies which produce coconuts, but actually is produced for export in substantial quantities only in Ceylon. Considerable quantities of bristle fibre, mattress fibre and coir yarn and small quantities of coir rope are exported, the total value of such exports in 1933 being about £181,000.

From the point of view of the Colonial Empire the most important of the minor fibres is **piassava**, derived from the lower part of the leaf stalks of two palms, viz., *Raphia vinifera* and *Raphia Gaertneri*, which is used for making brooms and brushes and is produced chiefly in West Africa. Exports from Sierra Leone in 1933 were 3,500 tons valued at £30,108, and those from Nigeria 437 tons valued at £5,418. There were formerly some exports from the Gold Coast, but these ceased in 1930.

There is a small export (a few tons annually) from Tanganyika Territory of the softer **raffia fibre** derived from the cuticle of the leaves of the same plants and used for tying purposes.

Another minor fibre which is also used for brush making is **kitul fibre**, derived from the leaf basis of the palm *Caryota urens*. There are small exports of this fibre from Ceylon, in 1933 about 73 tons valued at £4,536.

A coarse fibre derived from the *Hibiscus cannabinus* and known in India as "Deccan hemp" or "Bimlipatam jute" and in Nigeria as *sama*, which is grown principally on the Madras coast in India, is produced in small quantities for local use in a number of Dependencies and is of some importance in Nigeria.

Ramie or "China grass" (*Boehmeria nivea*) is widely grown in India and has been tried experimentally in a number of Dependencies, but owing to the difficulty of decorticating it by hand and the fact that no efficient machinery has yet been devised for its preparation there is at present no production of this fibre within the Empire.

Kapok, a sort of silk cotton used for stuffing pillows, lifebelts, and similar objects, is derived from the seed of the tree *Eriodendron Anfractuosum*. It is cultivated in many tropical Dependencies, but little attempt has, so far, been made to collect and prepare it for the market. Production is confined almost entirely to the Netherlands East Indies. In 1933 about 200 tons of kapok were exported from Ceylon and 125 tons from Tanganyika Territory.

Table VIII* shows the total exports of fibres from the Colonial Empire during the years 1930 to 1933. It will be observed that although the total tonnage exported rose from a little under 97,500 tons in 1930 to a little over 122,250 tons in 1933, of which the principal part (nearly 67,250 tons in 1930 and nearly 89,500 tons in 1933) was East African sisal and the greater part of the remainder (nearly 24,250 tons in 1930 and over 27,250 tons in 1933) was fibres from Ceylon, chiefly coir, the total value dropped from not far short of £2 million in 1930 to only a little over £1½ million in 1933.

* See page 540.

FRUIT, FRUIT PRODUCTS AND NUTS USED AS FRUIT.

Very large quantities of fruits of various kinds are grown in the Colonial Empire. Of these the only ones which are of substantial importance as native foodstuffs are bananas, plantains, and mangoes. Other fruits are grown for local consumption otherwise than as staple foodstuffs or for export.

So far as the export market is concerned, for practical purposes the only important fruits are bananas, various kinds of citrus fruit and pineapples, and of these, pineapples are not exported to any extent except in the canned form. There are, however, good prospects of a considerable development in the export not only of the fruits mentioned above but also of other fruits, owing to the progress which has recently been made in the technique of preparing and packing fruit for export and also in the provision for the carriage of fruit by steamer transport to export markets. Bananas* and the closely allied fruit plantains, thrive best in the tropics but are grown over a very wide area. The principal producing countries are Central America, the West Indies, Tropical Africa, the Canary Islands, Formosa, Australia (Queensland), Fiji, and other islands in the Pacific.

In the Buganda Province of Uganda plantains, with sweet potatoes, are the staple foodstuff. In Tanganyika Territory it is estimated that about 250,000 acres are under this crop, but there are no exports at all. Similarly plantains and yams form the staple foodstuffs of the southern portion of the Gold Coast. Plantains are also grown in large quantities for local consumption in other parts of Africa and in other parts of the Colonial Empire, such as Ceylon, Malaya, and British Guiana.

Bananas grow in bunches consisting of "hands" made up of a number of individual fruits or "fingers." In most parts of the world bananas are exported in the bunch, but for the Australian market bananas are exported in hands or fingers packed in cases.

Statistics are normally recorded in "bunches," or "stems" but sometimes in "count bunches." The "count bunch" is a conventional unit, a bunch of nine hands or over being normally reckoned as a "count bunch", one of eight hands as three-quarters, one of seven hands as a half and one of six hands as a quarter of a count bunch. The weight of the bunch varies; it is sometimes reckoned as about 44 lb., that is at 50 to the ton; but in the Pacific the case of 80 lb. net of fruit is reckoned to contain the equivalent of two bunches and 40 lb. is sometimes taken as the standard weight of a bunch elsewhere. In the case of the Cavendish variety the average weight of a bunch is about 50 lb. but in some of the smaller varieties the bunch weighs only about 34 lb. In converting bunches to tons it is usual to reckon 50 bunches to the ton, which may sometimes give a weight somewhat higher than the actual.

There are several varieties of banana which enter into world trade, and though these have different characteristics from the point of view of quality and suitability for transport, and command slightly different prices on the market, these differences are not so great as to make it necessary to distinguish between the varieties in trade figures, nor indeed are such figures available.

There is no means of ascertaining the total annual production of bananas and plantains, but it is certainly much in excess of the amount which enters world trade.

The principal exporting countries are not those in which these fruits are a staple foodstuff and fluctuations in the local demand therefore, if they occur, have little effect on the quantities available for export.

The volume of exports is, however, greatly affected by climatic conditions. Several of the exporting countries are subject to hurricanes, and when destructive hurricanes occur, as they did in Jamaica in 1933, exports may be seriously affected for at least two years.

The following table shows the total exports from the principal exporting countries during recent years:—

Exports of Bananas from the Principal Exporting Countries, showing quantities in thousands of tons (bunches converted at the rate of 50 bunches = 1 ton).

Countries.	1929.	1930.	1931.	1932.	1933.
Jamaica	441	492	447	407	211
British Cameroons	1	3	11	15	17
British Honduras	3	2	2	2	3
Brazil	116	142	177	137	171
Canary Islands	180	200	191	135	139
Colombia	227	222	101	82	86
Costa Rica	204	196	101	89	85
Cuba	78	75	49	(a)	(a)
Formosa	77	96	115	94	162
Guatemala	144	114	135	(a)	(a)
Honduras	537	582	(a)	558	470
Mexico	114	131	103	(a)	(a)
Nicaragua	82	77	59	68	74
Panama	130	78	63	(a)	(a)

(a) Not available.

It will be seen that the Republic of Honduras is the principal exporter and that its exports have been steadily increasing. The second largest exporter is Jamaica where also exports have tended to increase; there was a set back, due almost entirely to climatic causes during 1932 and 1933 but a substantial recovery followed in 1934 and 1935.

* The word "banana" is a Western one and is not recognized at all in the East. "Plantain" is the term used in the East to cover both plantains (bananas which can only be eaten when cooked) and bananas. The home of the plantain is probably near the Malay Archipelago.

The following table shows imports into the principal importing countries during recent years:—

Imports of Bananas into the Principal Importing Countries, showing quantities in thousands of tons (bunches converted at the rate of 50 bunches = 1 ton).

Countries.	1929.	1930.	1931.	1932.	1933.
United Kingdom	299	300	323	342	318
Canada	79	79	80	62	47
Australia	3	2	1	1	2
New Zealand	9	6	7	10	8
Irish Free State	3	3	4	4	4
Argentina	(a)	40	61	76	152
Belgium	16	21	30	37	25
France (b)	126	181	211	221	197
Germany	87	101	109	111	96
Japan (c)	76	94	112	91	153
Netherlands	26	30	32	39	30
Spain	23	34	23	21	21
United States of America	1,303	1,255	1,117	989	792

(a) Not available.

(b) Gross weight; includes packing, etc.

(c) Formosan exports to Japan.

The United States of America is by far the largest importer of bananas in the world, taking in recent years nearly 60 per cent. of the bananas entering world trade. After reaching a peak in 1929, however, United States' imports have declined, especially in the past two years when they were just under 50 per cent. of the world trade, while imports into other countries have been steadily increasing, France in particular showing a spectacular increase since 1926. This tendency was reversed in 1933.

The following table shows imports of bananas into the United Kingdom during recent years:—

Countries whence consigned.	Quantity in thousands of bunches.					Value in £'000.				
	1930	1931	1932	1933	1934*	1930	1931	1932	1933	1934*
British West Indies	5,924	6,971	10,736	6,628	10,358	1,994	1,997	2,540	1,304	2,260
Other British Countries	—	8	—	2	68	—	3	—	—	23
<i>Total British Countries</i>	5,924	6,979	10,736	6,630	10,426	1,994	2,000	2,540	1,304	2,283
Honduras (not British)	985	2,700	2,936	3,241	861	422	1,034	865	1,136	374
Brazil	1,429	1,472	1,451	2,086	1,732	539	577	325	520	412
Colombia	3,352	1,675	585	2,348	2,614	1,156	600	183	795	981
Canary Islands	967	892	521	519	341	624	487	240	238	155
Guatemala	—	183	532	474	1,094	—	57	156	166	366
Other Foreign Countries	2,332	2,261	346	610		929	783	120	190	
<i>Total Foreign Countries</i>	9,065	9,183	6,371	9,278	6,642	3,670	3,538	1,889	3,045	2,288
TOTAL	14,989	16,162	17,107	15,908	17,068	5,664	5,538	4,429	4,349	4,571

* Provisional figures.

The most striking recent development in the United Kingdom's import trade has been the rapid increase in imports from Jamaica at the expense of those from foreign countries. In 1926 imports from the Empire constituted only 27 per cent. of total imports of bananas; in 1932 the proportion had risen to 62 per cent. The reduction in 1933 was due principally to the adverse climatic conditions in Jamaica, as stated above. The proportion in 1934 was 61 per cent.

Bananas enter the United Kingdom from Empire countries free of duty. Imports from foreign countries are subject to a duty of 2s. 6d. per cwt.

So far as the Colonial Empire is concerned it is necessary to distinguish between those producing countries which are exporters and those which are not.

In East Africa Uganda and Tanganyika Territory, as stated above, are very large producers for internal consumption. There is some production in Zanzibar and possibly in the other Dependencies.

In West Africa there is a large production of plantains in certain areas and the possibilities of promoting production of bananas for export are at present under examination in all Dependencies except the Gambia. Such production has increased to a marked extent in the Cameroons under British Mandate during recent years from European-owned plantations. Experimental shipments have also been made from Sierra Leone and the Gold Coast. 16,790 tons of fresh bananas valued at £35,275 and 535 tons of dried bananas valued at £15,218 were exported in 1933 from Nigeria, including the Cameroons under British Mandate, most of the supplies in fact coming from the latter.

In Ceylon and Malaya bananas and plantains are a minor food-crop, but there is no export.

In Palestine, small quantities of bananas are grown in the Jordan Valley.

In the West Indies Jamaica is the principal exporting Colony and bananas are its principal export, representing 43 per cent. of all domestic exports in 1933. British Honduras is an exporter on a small scale (exports were valued at a little over £13,400 in 1933). Exports from British Honduras have decreased during recent years owing to a more rigorous standard of quality, shipping difficulties and the occurrence of disease, but have recently recovered to a considerable extent. There is also some production in most of the other West Indian Colonies, and in the case of Trinidad, Grenada, and St. Lucia long term agreements have recently been made for the export of the fruit to Canada.

Fiji and all the other Dependencies in the Western Pacific, except the Gilbert and Ellice Islands, are producers of bananas and in Fiji the export trade was formerly an important one. It was almost destroyed by the imposition of heavy duties in Australia, the principal market, some fifteen years ago, but has recently revived on a modest scale, being assisted in the case of Australia by the grant of a small quota for imports at a reduced rate of duty in pursuance of the Ottawa agreement.

Table IX* shows the total exports of bananas from the Colonial Empire during the years 1930 to 1933. It will be seen that while the value was nearly £2½ million in 1930 it had dropped to just over £1 million in 1933.

Citrus fruits comprise a number of varieties, one of which, viz., the orange, is an export commodity of major importance, three others, viz., grapefruit, lemons and limes are export commodities of minor though increasing importance, and others again, such as pummelos, of very small importance.

Oranges.—Almost the whole of the world's orange production is found between latitudes 20° and 40° both north and south of the Equator. There are small areas of cultivation outside these limits but rather over 99 per cent. of all oranges are grown within them.

There are a number of varieties of orange. Those which are commonly regarded as best and command the highest price are the large oranges, often elliptical in shape, such as American seedless navel oranges and "Jaffa" oranges. The Spanish oranges are usually smaller and spherical, and so are some Palestine oranges. Brazilian oranges are normally spherical and have a distinctive flavour. Mandarins and tangerines with loose skins are usually included with ordinary oranges, but in some cases are distinguished. Most Japanese oranges are classified as mandarins. Although the individual large orange commands a higher price than a small one, boxes of small oranges usually command a higher price than boxes of large oranges, the greater number of fruit outweighing the smaller individual price.

There are two main seasons for oranges. The northern hemisphere oranges, including almost all supplies from the Colonial Empire, come on the market between November and May; those from the southern hemisphere usually come on the market between June and October. In each case there is a tendency for an overlap particularly at the end of the season. Exceptionally, oranges from the United States of America, which are of several varieties and are grown in various climatic conditions, come on the market in every month of the year with a tendency to larger quantities in the months December to April.

An orange tree normally begins to come into bearing about five years after planting and is generally in full bearing after seven years. The fruit of young trees has a thicker skin and is therefore larger than the fruit of mature trees.

There are various reasons why it is difficult to obtain absolute accuracy about the orange trade. One is that figures of production, as opposed to export, are unobtainable from several countries. Another is that widely different units of measurement are used, including hundred-weights, metric quintals, boxes, and others. The commonest unit, the "box," can be taken as being normally 78 lb. gross weight or roughly one-thirtieth of a ton; the Spanish half-case is roughly equivalent to 1 cwt. gross weight.

The principal producers of oranges are the United States of America, Spain, Japan, Italy and Palestine. Until about 1927 the annual production of Spain, at a little under 900,000 tons per annum, slightly exceeded that of the United States of America, but since then there has been a large increase in the United States crop, which averaged 1,518,000 tons from 1931 onwards while the Spanish crop has stayed fairly steady at about 860,000 to 1,070,000 tons. In Japan the annual crop has remained fairly steady between 268,000 and 312,000 tons, while in Italy the crop, which has seldom exceeded 268,000 tons before 1932 rose to 454,000 tons in that year. While precise statistics are unobtainable, it is estimated that the Brazilian crop is now about 286,000 tons annually, with a tendency to increase.

The production of Palestine is steadily increasing. Comparatively recently it did not exceed 70,000 tons a year, but in the 1933-34 season exports, which are of course substantially below total production, were about 170,000 tons, and in 1934-35 they exceeded 215,000 tons. New areas are still coming into bearing and a further substantial increase is inevitable. In Australia, the average annual production for the three years ended 1932-33 was between 73,000 and 74,000 tons. No other country's crop is known to exceed 70,000 tons but the Union of South Africa and Algeria are within measurable distance of that figure, while Uruguay and Syria are probably not far short of 50,000 tons. The production of China is unknown but may be very large. It seems probable that the United States, Spain, Italy, and Japan between them produce about three-quarters of the world crop, and that the total annual crop is now not less than 3,750,000 tons and not more than about 4,465,000 tons.

Figures of areas under orange trees are very incomplete but it is clear that substantial increases have taken place in recent years and that world production is still substantially below the probable production of the next few years. In the United States the acreage rose from 314,000 acres in 1926 to 366,000 acres in 1928 and in Spain from 133,000 acres in 1926 to 179,000 acres in 1931. In Italy and Japan the figures are more or less stationary. In Palestine there has been a continuous increase in the area under citrus fruit, but there was little new planting in 1935 owing to the poor prices obtained for the 1934-35 crop.

Most of the United States production is consumed within its own borders, and Spain, which exports about three-quarters of its crop, is easily the largest exporter, its exports, at any rate until the last year or two, being roughly twice as great as those of all other exporting countries combined. The remaining principal exporters, in order of importance, are Palestine, Italy, the United States of America, Brazil, the Union of South Africa, Japan, Algeria, Australia, and various Central and South American countries.

* See page 541.

The principal markets for exported oranges are in Europe. The United Kingdom is easily the most important, taking probably one-third of all oranges entering world trade. Germany normally takes about half as much as the United Kingdom, and France over half in 1933. Other European markets take much smaller supplies, and during the last two years many have probably taken less than ever. There has, however, been a steady increase in consumption in the Scandinavian countries. Imports into the United Kingdom during the winter season have declined from the high point reached in 1932-33, the imports in 1934-35 also being slightly below those in 1933-34. There has also been a substantial decline in the imports into Germany owing to exchange difficulties.

The only other important market for Empire oranges is Canada which takes substantial quantities.

In the United Kingdom oranges of Empire origin are admitted free of customs duty; foreign oranges (including oranges from Palestine) are dutiable at the rate of 3s. 6d. per cwt. if imported between the 1st of April and the 30th of November and at 10 per cent. *ad valorem* during the rest of the year.

In Canada "oranges the produce of Palestine (when imported direct from the country of growth and production) during the period from the 1st of January to the 30th of April" are admitted free of duty. Other oranges are admitted free of duty under the British Preferential Tariff and are subject to a duty of 35c. per cubic foot under the Intermediate and General tariffs.

The following tables show the total imports of oranges into the United Kingdom and Canada during recent years.

IMPORTS OF ORANGES INTO THE UNITED KINGDOM.

<i>Countries whence consigned</i>	<i>Quantities in tons.</i>						<i>Value in £'000.</i>				
	1930	1931	1932	1933	1934*		1930	1931	1932	1933	1934*
Palestine	66,164	64,450	81,851	97,151	102,334		1,370	1,314	1,355	1,420	1,520
Union of South Africa	54,128	46,975	50,218	56,085	60,841		1,789	1,232	1,413	1,168	1,196
Southern Rhodesia	882	1,487	3,866	2,623	} 12,535		27	44	87	44	} 216
Australia	9	273	33	2,312			1	7	1	44	
Other British Countries	175	287	331	1,446			4	7	7	25	
<i>Total British Countries</i>	121,358	113,472	136,299	159,617	175,710		3,191	2,604	2,863	2,701	2,932
Spain	360,282	296,071	262,339	330,801	253,003		5,657	4,613	3,441	3,605	2,974
Brazil	17,541	55,951	48,577	55,297	60,956		451	1,159	832	1,033	1,170
United States of America	1,878	42,323	14,631	27,073	25,020		65	954	370	582	507
Other Foreign Countries	9,299	11,757	5,283	4,953	5,256		184	218	88	69	77
<i>Total Foreign Countries</i>	389,000	406,102	330,830	418,124	344,235		6,357	6,944	4,731	5,289	4,728
GRAND TOTAL	510,358	519,574	467,129	577,741	519,945		9,548	9,548	7,594	7,990	7,660

* Provisional figures.

IMPORTS OF ORANGES INTO CANADA.

<i>Countries whence consigned</i>	<i>Quantities in boxes (b) or in cubic feet (c)</i>						<i>Value in \$'000.</i>				
	1930 (a) (b)	1931 (a) (b)	1932 (a) (c)	1933 (a) (c)	1934 (a) (c)		1930 (a)	1931 (a)	1932 (a)	1933 (a)	1934 (a)
United Kingdom	58,603	83,437	46,137	37,201	6,651		211	374	67	64	9
British West Indies	6,737	16,593	127,995	194,033	121,013		18	73	137	68	69
Other British Countries	605	43,433	146,597	98,496	133,479		4	164	200	106	142
<i>Total British Countries</i>	65,945	143,463	320,729	329,730	261,143		233	611	404	238	220
United States of America	2,708,465	2,080,218	4,463,740	3,592,047	3,654,768		8,681	8,282	5,709	4,488	4,138
Japan	107,547	104,219	162,746	163,284	175,956		361	320	283	340	313
Spain	24,207	23,261	43,520	33,158	41,528		77	88	33	23	47
Other Foreign Countries	5,387	55,272	27,887	6,715	16,388		16	192	31	6	16
<i>Total Foreign Countries</i>	2,845,606	2,262,970	4,697,893	3,795,204	3,888,640		9,135	8,882	6,056	4,857	4,514
GRAND TOTAL	2,911,551	2,406,433	5,018,622	4,124,934	4,149,783		9,368	9,493	6,460	5,095	4,734

(a) For the year ending 31st March.

So far as the Colonial Empire is concerned, oranges are grown in at least fourteen Dependencies but are a crop of major importance only in Palestine.

In Palestine oranges are the principal export and now represent about three-quarters of the total domestic exports from the territory. In 1931, total domestic exports of merchandise were valued at £P.1,572,061 of which £P.904,310 or 57·5 per cent. represented the value of exports of oranges. In 1932, the figures were £P.2,381,491 and £P.1,709,605 or 71·8 per cent. respectively, and in 1933, £P.2,591,617 and £P.1,952,243 or 75·3 per cent. respectively. Nearly the whole of the crop destined for export is packed in boxes and exported by sea, but small quantities are exported in bulk to Egypt and Syria. Almost the whole of the trade between Palestine and Egypt disappeared in 1932 owing to a large increase in the Egyptian import duty on oranges designed to stimulate production in Egypt itself. Of the exports about 70 per cent. are sent to the United Kingdom, this figure remaining more or less constant in spite of the great increase in exports. The following table shows exports by crop years:—

<i>Country of destination</i>	1928-29 '000 boxes	1929-30 '000 boxes	1930-31 '000 boxes	1931-32 '000 boxes	1932-33 '000 boxes	1933-34 '000 boxes
United Kingdom	1,259	1,997	1,725	2,563	3,011	3,256
Germany	191	421	510	655	793	1,298
Rest of Europe	126	148	193	382	395	561
Other destinations	5	130	42	32	31	43
Total	1,581	2,696	2,470	3,632	4,230	5,158

Exports in 1934-35 are expected to exceed 6½ million boxes according to the latest information available (May, 1935).

In Jamaica oranges are a crop of minor importance. Exports have increased considerably in recent years, and it is hoped to improve and reorganize the trade in the near future. The great bulk of exports go to Canada.

Certain other West Indian Colonies, viz., Trinidad, the Windward and Leeward Islands, export small quantities of oranges to neighbouring islands and also to Canada. Steps are now being taken to stimulate the Canadian trade.

In Cyprus oranges are a crop of increasing importance. Until 1932 nearly the whole export crop was sent to Egypt, but this trade is likely to disappear owing to the large increase in Egyptian import duty on oranges. The export trade to the United Kingdom, however, is now being rapidly developed and it is hoped that with provision of direct shipping facilities the United Kingdom may become the principal market.

In Malta most of the crop is consumed locally and the export trade is at present of negligible importance.

In West Africa the production of oranges for export is still in the experimental stage. Nigeria produces considerable quantities of oranges which are for the present consumed locally, whilst in Sierra Leone a special citrus experimental station has been established with a view to encouraging production for export.

There is some production in Zanzibar, where the fruit is said to be of excellent quality, but there are no exports.

There is also a small production in Fiji and Tonga, but the exports are not shown separately from the exports of other fruits.

Besides the export of fresh fruit, there are small exports of orange-juice and orange-oil from Jamaica.

Grapefruit are produced in the same areas, under the same climatic conditions and during the same seasons as oranges.

Compared to oranges, grapefruit are of minor importance in world trade but both production and consumption are increasing by leaps and bounds.

The principal producer is the United States of America, which probably produces more grapefruit than the rest of the world put together.

The area under this crop in the United States of America is increasing rapidly and rose from 71,000 acres in 1926 to 120,000 acres in 1928.

Other foreign producers are relatively unimportant, the principal ones being Porto Rico and Cuba.

The principal Empire producer is the Union of South Africa. Palestine is producing the fruit in increasing quantities but its exports of grapefruit are relatively unimportant compared to its exports of oranges. Exports during the seasons 1932-33, 1933-34 and 1934-35 have been about 9,000, 12,500 and 22,000 tons respectively.

The United States of America consume over 90 per cent. of their total crop, and import a certain amount of fruit from Cuba and Hawaii but on balance are an exporter. Of their exports about 60 per cent. come to the United Kingdom; the remainder goes to Canada.

The United Kingdom is the principal importing country, taking nearly the whole of the exports from the Union of South Africa, Southern Rhodesia, and Palestine and the greater part of the exports from the West Indies; the remainder of these goes to Canada.

Imports into other European countries are relatively unimportant.

Imports from the United States of America, Cuba, and Porto Rico into the United Kingdom extend throughout the year but are greatest in the spring and autumn; those from the Union of South Africa arrive between May and October and those from the Colonial Empire between October and March.

Empire grapefruit enters the United Kingdom free of customs duty; the duty on foreign grapefruit is 5s. per cwt. Imports from Palestine are subject to this duty.

In Canada, grapefruit "when imported from the place of growth by ship direct to a Canadian port" is admitted free of duty under the British Preferential Tariff and subject to duties of $\frac{1}{2}$ c. and 1c. per lb. under the Intermediate and General Tariffs respectively. Imported otherwise the rates of duty are $\frac{1}{2}$ c., 1c., and 1c. per lb. respectively.

It will be observed from Table X* that until 1932 the principal exporter in the Colonial Empire was Jamaica, but that in that year Palestine, from which exports have increased very rapidly, took the first place.

Exports from the other West Indies, viz., Trinidad and the Windward and Leeward Islands, are increasing rapidly but are still inconsiderable.

Exports from British Honduras have hitherto been small but are expected to increase rapidly in the near future.

A small export trade in *canned grapefruit* has become established in Jamaica in the last year or two.

As regards quality, certain fruit from the United States of America is of the highest quality; the exports from British Honduras and Trinidad and a small part of the Palestine crop reach the same standard, but the remainder of the output of the Colonial Empire is of lower quality.

Imports of grapefruit into the United Kingdom in recent years are shown in the table immediately below.

IMPORTS OF GRAPEFRUIT INTO THE UNITED KINGDOM.

Country whence consigned	Quantity in cwt.					
	1929	1930	1931	1932	1933	1934 (provisional)
Palestine	2,978	10,217	35,518	75,359	129,448	||
Union of South Africa	26,381	46,753	65,289	74,717	133,788	151,424
British West Indies	41,125	25,090	35,330	71,578	69,722	||
Other British Countries	4,765	7,647	2,242	2,505	2,006	368,529
<i>Total British Countries</i> ...	75,249	89,706	138,379	224,159	334,964	519,953
United States of America ...	420,270	391,051	570,108	433,486	345,352	338,706
Porto Rico	6,733	25,702	78,864	36,074	32,961	} 114,975
Cuba	16,231	37,322	81,549	41,741	20,573	
Other Foreign Countries ...	24,344	12,532	27,337	37,067	41,803	
<i>Total Foreign Countries</i> ...	467,578	466,607	757,858	548,368	440,689	453,681
GRAND TOTAL	542,827	556,313	896,237	772,527	775,653	973,634

Country whence consigned	Value in £					
	1929	1930	1931	1932	1933	1934 (provisional)
Palestine	3,635	12,276	40,056	85,608	153,745	||
Union of South Africa	68,072	106,870	122,963	176,730	214,665	205,025
British West Indies	51,661	36,132	42,664	84,303	77,171	||
Other British Countries	8,521	12,771	3,698	2,571	2,542	386,340
<i>Total British Countries</i> ...	131,889	168,049	209,381	349,212	448,123	591,365
United States of America ...	693,275	613,412	765,714	540,603	486,647	431,583
Porto Rico	9,299	38,596	113,080	48,214	39,293	} 138,931
Cuba	33,327	62,325	107,972	48,405	25,173	
Other Foreign Countries ...	34,351	20,394	37,955	36,659	59,173	
<i>Total Foreign Countries</i> ...	770,252	734,727	1,024,721	673,881	610,286	570,514
GRAND TOTAL	902,141	902,776	1,234,102	1,023,093	1,058,409	1,161,879

Limes are a fruit of less importance than oranges and grapefruit. While they are consumed to some extent in a fresh form both in the countries of production and in the United States of America and Canada, to which they are exported in small quantities from the West Indies, they are principally used for the manufacture of lime-juice and lime-oil. Lime-juice is exported to some extent in its natural form, but a large part of the exports is reduced to concentrated form before export. Lime-juice has hitherto been used chiefly for the manufacture of citric acid, but for the reasons stated in the memorandum on Dominica† the demand has fallen away very much in recent years. As regards lime-oil, see the memorandum on Essential Oils.‡

Limes are the principal product of Dominica and exports of limes and lime products in 1933 were valued at £17,758 or 43 per cent. of all domestic exports.

They are also the second most important export of St. Lucia, the value for 1933 being £20,801, about 21 per cent. of all exports.

* See page 542.

† See page 378.

‡ See page 472.

|| Included under "Other British Countries."

There is some production both for local consumption and for export in Montserrat, Jamaica, Grenada and Trinidad. In British Guiana, British Honduras, Antigua, and St. Vincent there is also a small production, chiefly for local consumption.

Outside the West Indies limes are grown in nearly all tropical parts of the Colonial Empire for local consumption. They have recently been grown on a small scale in the Gold Coast, where some 2,000 acres are now under cultivation in this crop. In 1933, 3,300 tons of fruit were utilized for the production of juice for export and for distillation for oil. In addition, 257 tons of fresh fruit were exported.

Lemons are a citrus fruit of substantial importance in world trade, but there is very little production in the Colonial Empire. There is some production for export in Cyprus and a little production in the Bahamas and certain other West Indian Islands.

Lemons are also being grown on an experimental scale in Sierra Leone and the Gold Coast.

Table X* shows the total exports from the Colonial Empire of citrus fruit of all kinds, and Table XI† shows those of lime-juice, during the years 1930 to 1933. It will be observed that, while the value of exports of lime-juice has been falling rapidly, that of exports of citrus fruit has increased from just over £1 million in 1930 to over £2½ million in 1933, an increase without parallel among the other agricultural products of the Colonial Empire during this period.

Pineapples are grown, chiefly for local consumption, in a number of tropical Dependencies including Kenya, Zanzibar, the Gold Coast, Nigeria, Sierra Leone, Hong Kong, the Bahamas, British Guiana, Jamaica, the Leeward Islands, St. Lucia and St. Vincent. In Fiji, there has been a canning industry of small dimensions for some years past; the number of cases of canned pineapples produced in 1933 was 9,843. Exports in 1933 were 170 tons valued at £5,582.

A pineapple canning factory has also been established in Mauritius. Reports received from London on canned Mauritius pineapples have been encouraging, the prices paid comparing favourably with those of the best Hawaiian products; but difficulty has been experienced in getting a sufficient area planted to supply the factory, and plans for reorganizing the industry are now being considered.

In Malaya, pineapples are grown on a large scale and a very substantial export trade in canned pineapples has been built up. Over 40,000 acres are under this fruit in Johore, about 8,000 acres in Selangor (Federated Malay States) and nearly 10,000 acres in Singapore Island. Originally the fruit was grown as a catch-crop with rubber and coconuts, but is now being grown more and more as a sole crop.

There are two canneries in Selangor, eight in Johore, and five on Singapore Island and much of the fruit from Johore is sent to Singapore for canning.

Total exports from Malaya in 1933 were 59,581 tons valued at £733,303.

Malayan canned pineapples form a considerable part of the total world supplies, but are not of such high quality as Fijian, Australian, and Hawaiian produce.

The methods of measurement employed in this trade are somewhat complicated. The pineapple (sliced or cut in cubes) is packed into tins and the tins, for export purposes, are packed in wooden cases. Trade figures are normally expressed in cases or in pounds and multiples thereof; in the latter event the weights are of the fruit and the tin containing it, but apparently not always of the wooden case.

The "standard" Malayan tin weighs 1½ lb., 20 oz. of fruit and juice and 4 oz. of tin.

It is packed in a "standard" case of 48 tins, the wooden case weighing 8 lb.; the gross weight therefore is 80 lb. and the net weight of the tins 72 lb. By net weight therefore 31, and by gross weight 28, cases go to the ton, but as the case measures nearly 2 cubic feet, the 50 cubic feet shipping ton contains only 27 cases.

Almost the whole of the Malayan exports are of these standard cases. The other, exceptional, methods of packing are cases of 6 tins each of 10, 11, or 12½ lb.; cases of 12 tins of 3½, 6, or 8 lb.; cases of 24 tins of 2½ or 3 lb.; cases of 36 tins of 2 lb.; cases of 48 tins of 1 lb. and cases of 96 tins of ½ or 1½ lb.

The average weight of the Fijian case is about 39 lb. and its contents are therefore presumably 24 standard tins of 1½ lb.

Table XII‡ shows the total exports of fresh and canned pineapples from the Colonial Empire during the years 1930 to 1933. It will be observed that there has been a reduction in value since 1930 but that the value remains not far short of £1 million annually.

Dried fruits.—In Cyprus there is quite an important manufacture and export of raisins. During 1933 it was estimated that 3,125 tons were produced. Exports during the past five years have been as follows:—

		Quantity in cwt.	Value in £			Quantity in cwt.	Value in £
1929	...	97,087	67,148	1932	...	62,354	33,235
1930	...	103,149	73,138	1933	...	99,374	58,999
1931	...	53,373	43,735				

The production of sultanas and currants is also encouraged in Cyprus. During 1933 the production of the former amounted to over 1½ tons.

Raisins are also exported from Palestine. During 1932 exports were 249 tons valued at £2,761, but fell in 1933 to 35 tons valued at £575.

Papaine, the dried latex of the fruit of the papaw, is a minor fruit product of some small importance. The chief exporter in the Colonial Empire is now Ceylon (value of exports in 1933 a little over £22,000).

* See page 542.

† See page 544.

‡ See page 544.

There was formerly a small export from Montserrat, but very little is now produced.

Other fruits which are already exported in small quantities are melons and pomegranates from Cyprus, Malta, Palestine, and Fiji, avocado pears and mangoes from certain of the West Indies and a few other fruits from various dependencies.

A number of other fruits which are not exported or only exported in very small quantities are mentioned in various of the memoranda in Part I.

Disregarding these, as being of little importance, the value in round figures of the export trade in fruits and fruit products from the Colonial Empire during recent years may be summarized as follows:—

	1930	1931	1932	1933
	£	£	£	£
Bananas	2,408,000	2,093,000	2,003,000	1,158,000
Citrus fruit	1,077,000	1,095,000	1,989,000	2,270,000
Pineapples	926,000	834,000	932,000	740,000
Lime-juice	34,000	14,000	13,000	11,000
Lime-oil	93,000	98,000	69,000	67,000
Raisins	75,000	46,000	36,000	59,000
	<u>4,613,000</u>	<u>4,180,000</u>	<u>5,042,000</u>	<u>4,305,000</u>

With a total of rather over £4 million in 1933 fruit and fruit products were one of the more important exports of the Colonial Empire.

Nuts used as fruit are not, with the exception of coconuts, which in the present volume are classified under "Oil-seeds and nuts," of any substantial importance in the Colonial Empire.

Almonds are grown in Cyprus and Palestine.

Cashew nuts are grown in Tanganyika Territory, Zanzibar, Jamaica, and a number of other Dependencies.

Hazel nuts are grown in Cyprus.

There are some prospects of developing an export trade in ye'eb nuts (the fruit of the *Cordeauxia edulis*) from Somaliland.

GUMS AND RESINS (OTHER THAN RUBBER).

Gums and resins are the dried exudations of certain trees. In some cases the natural exudations only are collected, but in most cases incisions are made in the bark to promote the flow of the juice. A number of species of trees yield such exudations, but their properties and uses vary very greatly.

The term "gum" is used both in the narrower sense to designate the true gums and also in a wider sense to designate certain resins and also certain other substances which are not really gums at all.

The present memorandum is therefore divided into three parts dealing respectively with I the true gums; II the resins, which include both gum-resins and oleo-resins, and III these other miscellaneous substances. One commodity in the third group, viz., rubber, stands out from the rest by reason of the fact that it is of very much greater economic importance, and a separate memorandum is devoted to it.

I.—True Gums.

True gums can be divided into two main classes, those which are soluble in water forming viscous solutions with adhesive properties, and those which are not soluble but absorb water swelling up to form a jelly or thick mucilage. A third class of semi-soluble gums may be distinguished, but these are of lesser importance.

Soluble gums are used for many purposes. The finest and least coloured varieties are used for clearing liqueurs, for "finishing" silk and in the preparation of fine water-colours. The other high-class grades are used in confectionery (particularly in the manufacture of "clear gums") and pharmacy, in sizing and "finishing" textiles and paper, in calico printing and in certain dyeing processes. The cheaper varieties are used in the manufacture of adhesives, stationery, matches, and ink.

The soluble gums are derived from various species of *Acacia*.

Gum Arabic, the best known and most important member of the group, is collected from the grey-barked *Acacia Senegal*, known locally in the Sudan as the *hashab*. Inferior qualities are collected from the "red" and "white" barked varieties of the *Acacia Seyal*, known locally in the Sudan as *talh* or *talha*, and are darker in colour than the other variety. Inferior qualities are also derived from other *Acacias* such as *stenocarpa*, *caffra*, and a number of others.

The principal sources of the soluble gums are the Sudan, and, less important, French West and North Africa. There is also some production in South Africa and Abyssinia.

So far as the Colonial Empire is concerned, gum Arabic is exported from several African Dependencies. There is a growing export from Nigeria. The trade, having continued at a very low level for a number of years was taken in hand in about 1926 and from that year onwards for several years exports doubled themselves annually. By 1932 exports had increased to 599 tons valued at £10,970 and there are considerable prospects of further expansion, although in 1933 exports decreased slightly to 485 tons valued at £9,793.

There is some production of gum Arabic in Somaliland, but the exact dimensions of the trade are not at present known, since there is some difficulty in distinguishing between domestic exports of Somaliland produce and re-exports of Abyssinian and between gum Arabic and the resins (myrrh, frankincense, etc.) which are also produced in the Protectorate. Total exports of gums and resins of all kinds in 1933 were 8,467 cwt. valued at £9,112.

There is also substantial production of gum Arabic in Tanganyika Territory. Exports in 1933 amounted to 911 tons valued at £10,064.

Insoluble gums are used chiefly as a thickening agent in preparing the mixture of colours used in calico-printing and are also employed in pharmacy.

The most important member of the group is *gum tragacanth*, which is the product of various species of *Astragalus*, which grow chiefly in Asia Minor, Persia, and Greece. There is apparently no production of gums of this class in the Colonial Empire.

II.—Resins.

The resins, which are also frequently called "gums," are derived from a number of trees and are used mainly for the preparation of varnishes, but certain grades are also used for other purposes, such as the preparation of lacquers, patent leather, sealing wax, cheap soap, and paper size.

During recent years natural resins have been meeting with increased competition from synthetic products, for which certain superior qualities are claimed. There is a wide variety of resins and only certain of them are produced in the Colonial Empire.

The most important members of the group are the resins known commercially as **damar** and **copal**. Of the two, damar is the softer, has a slightly lower melting point and produces a softer surface in a varnish.

So far as the Colonial Empire is concerned Malaya is the principal source of supply of damar.

The word *damar* in Malay means simply "resin" and is used in a much less restrictive sense than it is in commercial practice.

A large number of damars in the wider sense exist; in "The Damars of the Malay Peninsula" (Malayan Forest Records No. 11, 1932) over 20 varieties are described, but a number of these are not produced in commercial quantities. Most of those of commercial importance are derived from *Dipterocarpaceae* and differ from one another principally in colour.

The most important member of the group is **Damar Penak**, which is derived from *Balanocarpus Heimii*. It is collected in a number of places both within and without the Malay Peninsula and brought to Singapore to be sorted and graded. The grades recognized by the Forest Department of Malay are:—*pale*, the most valuable of all representing about 23 per cent. of the total amount collected, *yellow* a slightly lower grade representing about 48 per cent. of the whole, *amber*, representing about 15 per cent. of the whole and *dust*, *coarse*, and *fine*.

Other damars of high quality are **Damar mata kuching** derived from species of *Hopea* and **Damar temak** derived from *Shorea hypochra*.

A number of damars of lower quality are collected and exported under their own name for example *Damar hitam* which is almost black and *Damar kepong* which is a dull yellow green or grey colour and is used chiefly for caulking boats.

Damar batu, one of the recognized grades is not a distinct species of resin but merely a mixture of inferior damars, used locally to make torches and to caulk boats.

It is impossible to state the exact amount of damar produced in Malaya. In 1933, 949 tons were produced in the Federated Malay States, 903 tons in Johore, and small quantities in Kedah and Kelantan. There was no production in Trengganu.

There is a large entrepôt trade in damar in the Straits Settlements. Imports in 1933 amounted to 4,919 tons valued at £45,246, of which 2,657 tons valued at £18,534 came from North Borneo, and exports to 7,624 tons valued at £103,851. It may therefore be assumed that Malaya and North Borneo together exported about 5,300 tons valued at roughly £77,000. It will be noticed that the necessary adjustments have been made in Table XIII.*

Copal is a harder resin, which has a relatively high melting point and furnishes a varnish which dries with a hard surface. It is known in Malaya as *Damar Minyak* or *Damar Sanum*, and in Malaysia is derived from the *Agathis alba*. In Malaya the resin does not harden after exudation to the extent that it does from the same species growing in the Netherlands East Indies and the Philippines.

Exports from Malaya are substantial, but the greater part of these are re-exports, the excess of exports over imports is generally very small and it is doubtful whether much is actually produced in Malaya, as the *Agathis alba* is not abundant in Malaya.

Copal produced from other resinous trees is also exported in small quantities from Kenya, Tanganyika Territory, Nigeria, the Gold Coast, and Sierra Leone.

There is a small production of certain other resins in Malaya, for example, *dragon's blood* and *sticklac*. *Borneo camphor* (which is derived from the *Dryobalanops aromatica* or Kapur tree and is quite distinct from the better known Japan camphor) is usually included in the same class, although it is actually a different product. The total quantities and values of these minor products are very small, and much of the trade is a re-export one.

Frankincense and **myrrh**, which of course have special uses, are produced in small quantities in Somaliland.

III.—Other Gums.

The remaining gums grouped under this head are a very miscellaneous collection.

Gutta percha is the coagulated latex of *Palaquium Gutta* and other trees of the family Sapotaceae. It is not unlike rubber in its chemical composition but it differs widely in its physical qualities. At ordinary temperatures it is hard, very tenacious and cannot be stretched, but when heated to a heat of about 140° F. it becomes plastic and can be moulded, but hardens again on cooling. It is the best non-conductor known for both heat and electricity. It is used principally for the insulation of submarine cables and has also been used for the manufacture of golf-ball covers, acid-resisting containers, adhesive cements and tapes, and other similar articles.

* See page 545.

The principal sources of supply are in Malaya and the Malay Archipelago but there is also some production of inferior gutta percha from different botanical sources in the West African Colonies.

Much of the Malayan trade is a re-export one. The excess of exports over imports, representing roughly the dimension of domestic exports, is about 500 tons a year. In 1933 the excess was 629 tons valued at £46,359.

Jelutong is the coagulated latex of several trees of the species *Dyera*. It is a white granular material resembling some of the inferior gutta perchas in appearance but containing 15 to 20 per cent. of rubber. When the price of rubber was high, attempts were made to extract the rubber from jelutong but the process was not a commercial success.

The principal use of jelutong is as a substitute for chicle in the manufacture of chewing gum; it is also employed for mixing purposes in rubber manufacture and, in the East, for adding to gutta percha.

Jelutong is produced only in Malaya and the Malay Archipelago.

There is a large entrepôt trade in the Straits Settlements which makes it difficult to determine the amount which is actually produced in the Colonial Empire, but roughly speaking the amount is between 3,000 and 3,500 tons, worth about £104,000 on the basis of 1933 values. The greater part of the supplies is derived from Sarawak.

Balata which is derived from the latex of the Bullet tree (*Mimusops globosa*) and is collected by "bleeding the tree" into small vessels. It is really an inferior form of gutta percha which it resembles both in composition and in physical qualities. It is used for many of the special purposes for which gutta percha is used. It is also largely utilized for the manufacture of machinery belting. It is produced only in British Guiana and in neighbouring South American countries, though it is considered that most of the products of these countries are of inferior quality. The trade is at present somewhat depressed and exports have fallen away in recent years. Exports in 1933 were 214 tons valued at £26,568 against a recent maximum of 444 tons valued at £81,310 in 1930.

Chicle is the coagulated juice or latex of the sapodilla tree (*Achras Sapota*), a tropical American tree. It is collected, like rubber and balata, by tapping the tree and is the basic constituent of chewing gum.

It is produced only in Central America, in British Honduras and in neighbouring foreign territories, particularly Guatemala. In addition to exporting its own products British Honduras also re-exports large quantities of foreign produce. Further particulars of the industry will be found in the memorandum on British Honduras* in Part I. Up to 1932 exports of domestic produce were on a small scale, and in the latter year amounted to only about 2,500 cwt. valued at about £20,000. In 1933 however there was an improvement and nearly 6,500 cwt. valued at over £43,000 were exported.

Table XIII† sets out the approximate domestic exports of gums and resins of all kinds (other than rubber) from the Colonial Empire in the years 1930-1933. It will be noted that in the case of Malaya the figures are necessarily an approximation for the reasons mentioned above and that in the case of Somaliland an unknown, but probably not large, quantity of re-exports is included.

MARINE PRODUCTS.

Three dependencies only of the Colonial Empire, Uganda, Nyasaland, and Northern Rhodesia, have no seaboard and even the three inland Protectorates touch the shores of the great African lakes. There is therefore no dependency where there is not some kind of fishing. In island Dependencies such as the Seychelles the fishing may be of local importance only; in others, though capable of great expansion, the landings already reach a considerable amount, as in Malaya, in which in 1933 they totalled over 60,000 tons. While there is some reason to believe that the fish of warmer seas are not as abundant as those of more temperate and particularly of sub-polar waters, the fishing which takes place is sufficient to show that Colonial fishery resources are in all cases considerable and in some (for instance certain West African Colonies) very valuable. The fish of the tropics, unlike those of more northern waters, are not usually found in dense shoals living at or close to the sea bed, being in fact more predominantly inhabitants of the surface waters or spread through the various depths. Attempts to introduce European trawling into colonial waters have, therefore, in some cases met with failure; as a result unduly pessimistic estimates have been framed of the stock available. There are, in fact, large supplies of certain fish awaiting exploitation, such as the Bonga in West African waters; there are others areas, such as the sea off Palestine, where known prosperous fishing in the vicinity renders abundant supplies probable: and there are many other areas in which the character and magnitude of the resources are almost entirely unknown.

The difficulties in the way of development are of three main classes, namely ignorance of the available stock and of its location, the necessity for adopting or developing suitable methods of capture, and difficulties of preservation and transport. None of these is insuperable. Knowledge of the stock can be achieved by the steady location and survey of fishing grounds such as is in progress in Ceylon: the development of suitable gear and craft can be brought about gradually wherever the requisite effort is made in the light of experience, both local and general: while the advances made in preserving methods, particularly in brine freezing and canning, have brought transport once impossible into the realm of practicability. Development can be brought about by, and only by the work of the specialist and the trader, carried out in complete co-operation. At

* See page 348.

† See page 545.

the present time, however, colonial fisheries are either primitive or in but early stages of development: fish both fresh, dried, and canned are imported in large quantities into territories possessing ample local resources, and marine products are only of minor importance in the economic structure of the Colonial Empire. The keynote of the fisheries is that of unexploited assets.

In two small Dependencies, the Cayman Islands and Ascension, and in one Colony, the Bahamas, marine products form the most important group of exports, but in the latter primary production is at present financially less important than the tourist traffic.

The Dependencies of the Falkland Islands also are used, in so far as they are used at all, to serve as a land base for whaling and sealing. With the growing utilization of seal hides, and of the pelts of hair seal as furs, the importance of sealing may increase. In these waters there is a very fair stock of fish, but it is utilized only by the men of the whaling stations, who from time to time detail a whale-catcher to catch fish for the supply of the station.

Intrinsically, and weight for weight, the most valuable marine product is the pearl, but pearls are not now produced in appreciable quantities in any part of the Colonial Empire. Production in Ceylon, formerly an important producer, has now ceased at any rate for the time being, except for a small production of inferior pearls from the window-pane oyster, and the only dependencies where pearls are now found, and that only occasionally, are Somaliland, Fiji, the Gilbert and Ellice Islands, and North Borneo.

Ordinary edible fish is hardly exported at all from the Colonial Empire. The Straits Settlements has a net export of about 4,500 tons of salt fish annually, prepared in the Colony from fresh fish, of which the greater part is caught by fishermen living in the Federated Malay States and sent to Singapore for this purpose.

There are quite trivial exports of fresh or salt fish from one or two other dependencies.

The following paragraphs contain a list, in alphabetical order, with brief notes, of the other marine products which are now exported from the Colonial Empire.

Bêche de mer.—*Bêche de mer* or *trepan* is the commercial name of a marine food product greatly esteemed by the Chinese. It consists of the dried body wall of several species of Holothurians (sea cucumbers or sea slugs), marine creatures closely related to sea urchins and starfish and included with them in the family of *Echinodermata*.

The living adult animals, which resemble gigantic slugs in general form, may be from six to fifteen inches in length. They live on coral reefs and in shallow coastal waters and are found under suitable conditions in all the tropical seas between the east coast of Africa and the west coast of America.

In the more important fisheries fishing fleets are engaged in the collection of these animals, but in the Colonial Empire collection is generally unorganized. The animals are collected by hand at low tide or sometimes by diving.

At the curing station they are boiled in large iron kettles for about twenty minutes, slit open lengthwise, gutted, and dried in the sun, and then smoked in a "smoke house" for twenty-four hours and packed for export in bags, or sometimes tin-lined boxes.

The finished article, which is much shrunken and looks like a charred sausage, is used as an ingredient of the gelatinous soups considered a luxury by the Chinese.

The principal countries of production in the Colonial Empire are Kenya, Tanganyika Territory, Zanzibar, Ceylon, North Borneo, the Seychelles, Fiji, and the British Solomon Islands. (Malaya exports bêche de mer, but is on balance an importer, and it is not clear whether there is any local production). Other producing countries are Australia, India, and a number of foreign countries in the Pacific and Indian Oceans.

The only consuming countries are China and other countries which contain domiciled Chinese communities.

The whole Colonial trade is a very small one, as the following table of exports for 1933 shows:—

Dependency.	cwt.	£
Kenya	412	1,130
Tanganyika Territory	907	1,835
Zanzibar	968	3,836
Ceylon	444	1,368
Seychelles	38	145
North Borneo	1,252	1,631
Fiji	255	1,348
Solomon Islands (1933-34)	260	1,632
	4,536	£12,925

Blachan, a sort of potted fish paste made from numerous small fish, is an article of minor importance in the domestic trade of British Malaya and the dependencies in Borneo.

Chank Shell, a large marine shell which is used in India for cutting and carving into bangles, is fished in Ceylon waters. Exports during recent years have varied from about one and a-quarter to three million shells annually valued at from £2,400 to £12,300.

Conch Shells are exported in very small quantities from the Bahamas and the Turks and Caicos Islands.

Crayfish are exported in small quantities from the Bahamas, and there is some possibility of developing an export trade from St. Helena.

Green Snail Shell is the shell of a large marine mollusc (*Turbo marmoratus*) found in shallow waters and on reefs, commonly in association with trocas shell and bêche de mer. The shell is also known to the trade as turban shell, turbo and burghaus shell. When mature it is roughly conical, about nine inches high and seven inches across, with a large central opening. The colour in the main is green marbled with white and reddish brown. The shell substance is thick and composed

of a pearly nacre. The shell is used mainly for button making, but the quantity employed is much less than in the case of trocas shell. The industry is carried on in Japan whence the buttons are exported chiefly to the Continent of Europe. The shells are also used for making spoons, buckles, knife handles, and inlay work.

Prices vary from about 20s. to 60s. per cwt. according to size.

The principal countries of production in the Colonial Empire are Malaya, Fiji, the British Solomon Islands, and the New Hebrides.

Other producing countries are Australia (with New Guinea), Burma, the Philippines, the Netherlands East Indies, and the countries on the Persian Gulf. In some countries exports of green snail and trocas shell are shown under a single head. The whole Colonial trade is a very small one.

The trade returns of Fiji and the New Hebrides do not give details of the export trade of green snail shell, and in the Malaya returns the figures are included with those for trocas shell, and will be found under that heading in this memorandum.

Exports from British Solomon Islands for the past five years have been as follows:—

			Quantity in tons.	Value in £.
1929-30	...	...	114	2,411
1930-31	...	...	106	1,909
1931-32	...	...	93	1,412
1932-33	...	...	91	1,248
1933-34	...	...	171	2,113

Pearl Shell, the shell of the pearl oyster (*Margaritifera*), which is used for the manufacture of the mother-of-pearl of commerce, is fished in many countries on the Indian and Pacific Oceans. There are several varieties of shell which vary somewhat in value.

The shell is becoming increasingly scarce and rare, and the London price recently was as much as £8 10s. to £11 per cwt.

Producing countries in the Colonial Empire are Somaliland, Ceylon, Fiji, and the Gilbert and Ellice Islands. The whole trade is a very small one, so far as the Colonial Empire is concerned.

Only the trade returns of Fiji and Somaliland show any figures relating to the export of pearl shell. The following table gives the figures of exports from these territories for the last five years.

Years.	Somaliland Protectorate.		Fiji	
	Quantity in cwt.	Value in £	Quantity in cwt.	Value in £
1929	...	...	—	—
1930	...	...	10	15
1931	...	...	217	216
1932	...	...	192	193
1933	...	...	115	128

Dried Prawns are a minor export from Brunei to neighbouring Malayan territories.

Seal Oil, the oil of the elephant seal or sea elephant, is produced in the Falkland Islands and the Dependency of South Georgia.

Exports during the last five years have been as follows:—

			Quantity in barrels.	Value in £.
1929	...	...	9,296	42,979
1930	...	...	12,962	48,072
1931	...	...	—	—
1932	...	...	11,842	25,282
1933	...	...	20,003	41,918

The barrel is one of 40 gallons and approximately 6 barrels go to the ton.

Shark and Alligator Skins are exported in small quantities from British Honduras and the Cayman Islands, the former for the manufacture of shagreen, the latter for the manufacture of leather used to make shoes, handbags, and similar articles.

The trade is a very small one.

In 1933, the Cayman Islands exported 14 cwt. of shark skins to value of £425.

The British Honduras exports for 1933 are as follows:—

	Quantity.	Value in £.		Quantity.	Value in £.
Alligator skins	...	12,139	3,880	Shark skins	...
				18,254 lb.	478

Sponges are produced in substantial quantities in the Bahamas, and in small quantities in Cyprus and the Turks and Caicos Islands.

In the Bahamas the industry is an important one and the exports, which in 1933 amounted to about 7,714 cwt. valued at £84,852 and represented about 58 per cent. of total exports, are still the most important individual export although production has considerably diminished in recent years.

Exports go to a wide range of countries, the United States of America, France and the United Kingdom taking between them about 60 per cent. of total exports.

In Cyprus the industry is of little importance.

The sponges are of good quality but exports in 1933 amounted only to 21 cwt. valued at £1,476.

The exports from the Turks and Caicos Islands in 1933 amounted to 250 cwt. valued at £2,037.

Sponge plantations have also been prepared in British Honduras and leased out by the Government. It is hoped that their products will shortly begin to be placed on the market.

Trocas Shells, also called "Trochus" or "Trochas" and in commerce "top shells" are the product of marine molluscs belonging to the genus *Trochus* which occur on reefs and in shallow waters chiefly in eastern tropical seas. By far the most important commercial species is *Trochus niloticus*, the shells of other species being "rough" and of inferior quality. The shells are

thick, top shaped and, when mature, about 4½ inches high and 3 to 4 inches in diameter. The thin outer layer is obliquely striped with irregular pink or reddish-brown bands on a white or buff coloured ground, and beneath is the dense, firm, pearly-white nacre which gives the shell its chief industrial value.

The shells are collected at low water, commonly by diving. A scarcity of the shell is likely to result from over-fishing and in certain countries it is illegal to take shells under a diameter of 8 centimetres (3½ inches).

The primary use of trocas shell is for the manufacture of buttons, its application for this purpose having greatly increased owing to the growing scarcity and consequent high prices of pearl shell. The button-making industry is mainly in the hands of the Japanese, and it is estimated that 90 per cent. of the pearl buttons used in Europe are of Japanese origin and made from trocas shell.

Small quantities of the shell are also employed as ornaments and for jewellery and bric-à-brac.

The London price of the shell was recently about 60s. to 75s. per cwt. according to quality.

The principal producing countries in the Colonial Empire are Malaya (which has a large entrepôt trade at Singapore as well as producing a substantial quantity of shell), North Borneo, Fiji, British Solomon Islands, New Hebrides and Sarawak.

Other producing countries are Australia, India, the Netherlands East Indies, China, Siam, the Philippines, and the countries lying on the Red Sea and Persian Gulf.

The largest individual user of trocas shell is Japan but certain Continental countries, including France, Germany, Czechoslovakia, Spain, and Holland, take substantial quantities. The quantity imported into the United Kingdom is relatively very small.

Exports in 1933 from the various Dependencies were as follows:—

Dependency.	Quantity in tons.	Value in £.
Malaya*	383	19,998 (includes green snail shell).
Fiji	365	19,945
British Solomon Islands ...	467	25,210
New Hebrides	110	1,782 (includes burghaus shell).
North Borneo	7	2,899 (includes all kinds, except turtle).

* Net exports, that is total exports less total imports.

Turtles and Turtle Products.—The marine turtles are inhabitants of the warmer waters of the equatorial Atlantic, the Indian, and the Western Pacific Oceans. They are caught either in the water or when they visit the sandy shores at night. There are three species of turtle of economic value to the Colonial Empire:—the Green turtle (*Chelonia mydas*) which is used in the manufacture of turtle soup, the Hawksbill turtle (*Eretmochelys* or *Chelonia imbricata*), the carapace of which is the source of the most valuable sorts of tortoise-shell, and the Loggerhead turtle (*Thalassochelys caretta*), which provides a rather inferior kind of tortoise-shell sometimes known as *caret*.

Live turtles are the only export of Ascension and the principal export of the Cayman Islands, though the quantities involved are in both cases small, and are also exported in small quantities from British Honduras, the Solomon Islands, and the Turks and Caicos Islands.

Turtle-meat is exported from the Seychelles and Jamaica and turtle eggs are exported from Sarawak and North Borneo.

Turtle shell (tortoise-shell) is exported from North Borneo, the Seychelles, the Bahamas, the Turks and Caicos and Cayman Islands, St. Vincent, and Fiji, but the quantities are everywhere small. Turtle skin is exported in small quantities from the Cayman Islands.

Whale products.—The carcase of the whale yields various products of which whale oil is very much the most important. Whales travel very long distances and frequent different areas at different seasons of the year, but broadly speaking they congregate in the cold waters near the pole in summer when conditions are favourable for the development of enormous numbers of the pelagic crustacea on which the whalebone whales exist, and scatter in the warmer waters right up to the equator during the winter, which is the breeding season.

Whale hunting is now an industry of some antiquity which has passed through a remarkable series of vicissitudes. At first it was an occasional and incidental off-shore occupation conducted from the land in the warmer waters which are the winter haunts of the whale. There are small survivals of this stage of the industry in St. Vincent and also, in a developed state, in South Africa, Australia, and New Zealand.

The next stage of the industry was that of the small self-contained whaler which sailed to suitable land-bases in the cold waters from which it ventured out into the high seas in pursuit of the whale, but generally brought back its catch to boil down at the shore base though part of the process was in course of time performed on board the whaler. It was in this stage of the industry that the Greenland and Spitsbergen whaling industries of the Arctic flourished, declined owing to excessive destruction of whales and finally perished when whales ceased to exist in quantities sufficient to make the undertaking a profitable one. Operations were then transferred to the Antarctic and centred on the Dependencies of the Falkland Islands and particularly South Georgia, where modern whaling first commenced in 1904. In this stage of the industry the whale is captured with a harpoon with an explosive head, fired from a small cannon in the bows of a specially designed steamer. The animal is then always towed into a whaling factory either built on shore or situated in a larger vessel anchored in the shelter of some creek or harbour.

By degrees the industry developed and the single self-contained whaler was replaced by a sea-going unit consisting of a large vessel, called a "floating factory," acting as a mother ship to a small fleet of attendant "whale catchers" which are responsible for catching the whales and bringing them to the floating factory, which is equipped to perform on the high seas all the functions formerly performed by the shore station.

Some shore stations still survive in the Dependencies of the Falkland Islands, but the industry is now principally a pelagic one carried on by large floating factories which enter harbour only occasionally to pick up stores and transfer their cargoes to transport vessels for despatch to the market, their main work being carried out in the shelter of the ice pack, and often in water "lanes" in it.

As stated above the most important product of the industry is **whale oil** which is classified into 5 grades, numbered 0, 1, 2, 3, and 4. Numbers 0 and 1 were at first made entirely from blubber; number 2 from the tongues and kidney fat and from the residue of blubber boilings; number 3 from the flesh and bones; and number 4 from refuse. With recent technical advances the proportion of numbers 0 and 1 oil to the whole has been greatly increased. The oil is usually classified for sale on the basis that the various qualities must not contain more than the percentages of impurity specified in the following table:—

					<i>Free Fatty Acid.</i>	<i>Water and Dirt.</i>
Nos. 0 and 1	...	...	...	...	2	$\frac{1}{2}$
No. 2	...	...	...	...	6	$\frac{1}{2}$
No. 3	...	...	...	...	15	1
No. 4	...	...	...	...	over 15	1

The oil is used principally for the manufacture of margarine and soap with glycerine as a by-product.

It is also used to a small extent for fibre dressing and currying leather and as a constituent of lubricants.

Whale oil is what is known as a soft oil, and is useless for making hard soap until it is "hardened" by hydrogenation. The hydrogenated product is a hard fat, white, odourless, and tasteless, which is a substitute for tallow. The best quality is used for margarine and other edible fats.

Grades 0, 1, and 2 are suitable for soap-making and grade 3 can be used for this purpose with some difficulty. The lower grades are used chiefly for lubricating greases.

Five products can be obtained from the meat and bones: (a) **whale meat**, which is eaten fresh in Norway and at the whaling stations, and is the principal whaling product of Japan. It has been canned from time to time, and this product is likely to increase in quantity; (b) **whale meat meal**, manufactured exclusively from absolutely fresh whale flesh, which is a cattle food containing about 17½ per cent. of protein; (c) **whale guano** made from the remaining flesh and about one-third of bones, which is a fertilizer containing about 8½ per cent. of ammonia and 21 per cent. of tribasic phosphates of lime; (d) **bone meal**, made exclusively from the bones, which is a fertilizer containing about 4 per cent. of ammonia and 50 per cent. of phosphates; and (e) **whale liver**, which is rich in vitamins, and when prepared as a vitamin-containing product is a valuable commodity, though not at present in large supply.

The remaining product is **whalebone**, **baleen** or "**finners**" (the latter the whalebone of the fin whale) which is now in little demand and hardly worth marketing. The baleen of fin whales, however, is used for the manufacture of brushes.

In 1933, only whale oil, whale guano and a small amount of whale bone were exported from the Falkland Islands and its Dependencies, the quantities being shown in the memorandum* on that Colony. It will be observed that the value of the exports of oil is about six times that of the exports of guano. A comparison with the figures set out below shows that only a relatively small proportion (under 15 per cent.) of the total production of whale oil now passes through the Colony, although nearly the whole amount is produced in that sector of the Antarctic Ocean which contains the Dependencies and stretches eastward, practically to the Ross Sea. Production is now centred in the hands of a few large companies, some British, some Norwegian, one Argentine, and a few of other nationalities. The personnel engaged in the actual business of whale catching are almost all Norwegian.

There have been remarkable fluctuations in the production of whale oil in recent years, as shown by the following table, extracted from *International Whaling Statistics* edited by the Committee for Whaling Statistics appointed by the Norwegian Government. (The season referred to in these statistics commences in the autumn and includes the following summer).

<i>Season.</i>	<i>Oil production in barrels (6 barrels = 1 ton).</i>	<i>Season.</i>	<i>Oil production in barrels (6 barrels = 1 ton).</i>
1913-14	804,118	1927-28	1,321,313
1919-20	407,327	1928-29	1,886,082
1923-24	716,246	1929-30	2,799,042
1924-25	1,040,408	1930-31	3,686,976
1925-26	1,152,536	1931-32	915,842
1926-27	1,191,922	1932-33	2,550,406†
		1933-34	2,478,348†

† From Messrs. Frank Fehr & Co.'s Reports.

The great increase in the production from 1925 onwards was due to the commissioning of a number of large new floating factories.

The result of this increase was a very severe fall in price, as is shown by the following table extracted from the Reports of Messrs. David Geddes & Son and, for 1932, 1933 and 1934, Messrs. Frank Fehr & Co. The prices given are for No. 0/1 whale oil; in the past there has been a

* See page 416.

difference of price of £3 to £4 between the various grades, but in 1931 the lowest price for No. 0/1 grade was only £1 10s. higher than the lowest price for No. 4 grade.

					<i>Price per ton naked.</i>	
<i>Year.</i>					<i>Highest.</i>	<i>Lowest.</i>
1927	...	...	...	...	£30 0 0	£26 10 0
1928	...	...	...	...	£31 10 0	£28 0 0
1929	...	...	...	...	£29 10 0	£25 0 0
1930	...	...	...	...	£26 0 0	£17 0 0
					(for small parcels at the end of the year).	
1931	...	...	...	...	£15 0 0*	£10 0 0
1932	...	...	...	...	£14 10 0	£10 0 0
1933	...	...	...	...	£15 0 0	£10 0 0
					(for very small quantities).	
1934	...	...	...	...	£12 0 0	£8 10 0

* Except for a large quantity of oil delivered at £25 per ton on contracts made in 1930.

There was a crisis at the end of the 1930-31 season owing to the enormous production of that season, and in the next season the Norwegian Companies decided not to operate at all. The production for that period was therefore confined to a few non-Norwegian Companies.

For the 1932-33 season the Norwegian and several non-Norwegian Companies made an agreement to restrict their production by quotas and their catch, together with that of the outside Companies amounted to 2,591,056 barrels.

For the 1933-34 season the principal whaling Companies made a fresh arrangement limiting their production to 1,950,000 to 2,000,000 barrels. All the Companies working the Antarctic fisheries were parties to this arrangement except the Southern Whaling and Sealing Company, a member of the Unilever group, which produced 360,000 barrels in the 1932-33 season and O. A. Knutsen (A/S Suderøy) which produced about 80,000 barrels in the 1932-33 season.

There have been remarkable fluctuations in the imports of whale oil into the principal consuming countries in recent years.

The United Kingdom has taken on an average rather over 90,000 tons annually, the figure for 1934 being about 110,000 tons. In Germany and Holland the figures for whale and fish oil are combined in a single figure. Germany which averaged 150,000 tons of these oils in 1930 and 1931 took 230,686 tons in 1932, but dropped back to 177,421 tons in 1933 and to 148,064 tons in 1934. Holland which averaged a little under 100,000 metric tons in 1930 and 1931 dropped to 32,239 metric tons in 1932, but rose again to 109,005 metric tons in 1933 only to fall back to 55,577 tons in 1934. In France imports are very small, only 2,000 to 3,000 tons annually.

In the United States of America the consumption of whale oil varies considerably. In 1930 the tonnage was 33,184 and rose in 1931 to 62,363, but dropped in 1932 to 323 only. Imports in 1933 were 2,344 tons and improved to 8,939 tons in 1934.

For many purposes whale oil can be used as a substitute for any of the large group of vegetable and animal oils and fats which are discussed in greater detail in the memorandum on oil-seeds and nuts and vegetable oils,† and the crisis in 1931 had a serious effect on the price of these commodities. While the general drop in all prices in those years was, of course, partly responsible for the drop in the prices of this group of products, there can be no doubt that the sudden increase in the production of whale oil was an important additional factor. On the other hand the increase in the production of whale oil from 1929 to 1931, only about 300,000 tons, is not a very large proportion of the total production of the whole group, which is tentatively estimated at approximately 8½ million tons, and it would be a mistake to put the whole responsibility for the deplorable state of the market in all oils and fats on the whale oil producers.

MINERALS.

Generally speaking, although by value the minerals group was the most important of the export products of the Colonial Empire in 1932, the importance of these mineral resources, so far as they are at present exploited, is less than that of the agricultural and perhaps even of the forest resources.

It is no doubt true that the exploration of these resources is not yet complete and that hidden riches may yet be waiting to be revealed, but at present the list of Dependencies which receive any substantial benefit from their mineral resources and also the list of minerals which bring any appreciable amount of revenue to the Colonial Empire are both short ones.

Moreover, it must be remembered that some of these resources are inevitably exploited in circumstances in which they create much less employment and bring much less direct benefit to the native inhabitants than agricultural products of comparable importance in terms of export values.

At the same time, it is true that large centres of mining development create demands for agricultural and other local products, and thus create employment indirectly as well as directly in the territories in which they are situated.

Except for substantial quantities of coal in Nigeria and the Federated Malay States and small quantities of such things as salt, fertilizers, building stone, and clay, there is scarcely any production of minerals in the Colonial Empire except production for export, and it can be taken for practical purposes that statistics of exports will serve as statistics of production after allowance has been made for the coal mentioned above.

† See page 498.

Two Protectorates, one Colony and one Dependency of a Colony are largely or almost wholly dependent for their export trade on minerals.

Northern Rhodesia, whose mineral riches have only recently been exploited, is now one of the most important producers of copper in the world and is also an important source of supply of other metals. Metals of various kinds, copper being much the most important, make up over 95 per cent. of all exports from the Protectorate.

Brunei, where considerable quantities of coal were formerly worked, has now been found to contain an important oil-field and in 1933 crude mineral oil accounted for about 80 per cent. of all exports from the State.

The Gilbert and Ellice Islands possess in Ocean Island one of the principal sources of phosphates in the Far East and phosphates are the more important of the only two exports of the Colony representing 76 per cent. of total exports in the year ending June, 1933. The other export is copra, which is the only export from islands in the Colony other than Ocean Island.

In the Turks and Caicos Islands salt, obtained by evaporation from sea water, represents over 70 per cent. of all exports.

In four Colonies and two Protectorates minerals are an important element in the export trade.

In Trinidad, exports of petroleum, petroleum products, and asphalt were valued together at rather under £2½ million out of total domestic exports of rather less than £4½ million in 1933.

In the Gold Coast, gold, diamonds, and manganese ore between them contributed nearly £2½ million to the total domestic exports of rather over £7½ million in 1933.

In British Guiana, diamonds, bauxite, and gold between them contributed nearly £300,000 or about 15 per cent. of the total domestic exports of £2 million in 1933.

Sarawak contains an important oil-field and crude petroleum and petroleum products of various kinds contributed about 39 per cent. of the domestic exports of the State in 1933.

In the Federated Malay States, tin is one of the major local products representing about 35 per cent. of all domestic exports in 1933.

During 1933 exports of gold, diamonds and platinum from Sierra Leone amounted to 21 per cent. of the total domestic exports. This percentage will show a considerable increase in 1934 because of the export of iron ore.

In a few other Dependencies, for example Kenya, Tanganyika Territory, Nigeria, Ceylon, the Unfederated Malay States, North Borneo, Cyprus, and Palestine, there are mineral deposits and exports of some importance, but elsewhere mineral wealth is non-existent or at any rate unexploited.

It would be beyond the scope of the present memorandum to give a complete account of the mineral resources of the Colonial Empire. In the following paragraphs however will be found some account of the present state of the exploitation of the more important minerals and some notes regarding potential resources of other minerals in the Colonial Empire. These do not profess to be exhaustive.

As a matter of convenience the minerals have been divided into four groups:—

- I. Metals and metallic ores.
- II. Precious stones.
- III. Petroleum, coal, asphalt, and similar substances.
- IV. Other minerals.

I.—Metals and Metallic Ores.

The metallic resources of the Colonial Empire which are exploited on a substantial scale at the present time are much restricted in range. There are two metals only, tin and copper, of which the production of the Colonial Empire represents a substantial proportion of the total world production and three other metals only, gold, manganese and iron ore of which the production represents an important proportion of the total production of any Dependency.

Tin ore is produced in substantial quantities in Malaya (almost the whole production within this area being centred in the Federated Malay States) and in Nigeria. Negligible quantities are produced in Uganda and Tanganyika Territory.

Tin ore production on a substantial scale is confined to relatively few countries. In 1929 the total world production (in terms of metallic tin) was as follows:—

	<i>Tons</i>
Malaya	69,366
Bolivia	46,338
Netherlands East Indies	35,235
Nigeria	10,734
Siam	10,517
Burma	2,649
The rest	16,000
	190,839

The total of 191,000 tons in 1929 represented a peak much in excess of the production of earlier years. In 1921 production was no more than about 105,000 tons and there was a more or less steady rise from that year onwards, owing chiefly to increased output in the Malay States and Bolivia. Consumption did not increase in proportion, and there was therefore a steady increase in stocks.

The price of tin reached a maximum in 1926, and thereafter began to decline. The following table shows the total amount of estimated production during the year and of stocks at the end of December in the years shown and the average price of tin per ton in London for the year:—

				Production Tons	Visible supply and "carry-over" in the Straits Settlements Tons	Average price £
1927	...	...	...	159,000	17,060	289
1928	...	...	...	177,000	24,938	227
1929	...	...	...	191,000	32,449	204
1930	...	...	...	175,000	46,623	142
1931*	...	...	...	149,000	59,247	118
1932	...	...	...	100,000	55,903	136
1933	...	...	...	91,000	29,135	195

* Control was introduced in March, 1931.

The unsatisfactory position of the industry first attracted the attention of producers towards the end of 1929. Various attempts were made to limit further production by voluntary methods in 1930, but the production of tin during that year still amounted to about 175,000 tons. Accordingly towards the end of 1930 the Tin Producers Association, an association of the producers in the four chief territories, prepared and submitted to the Governments of the Federated Malay States, Nigeria, the Dutch East Indies, and Bolivia proposals for a compulsory scheme for the restriction of output in these four territories. The scheme entered into force on the 1st of March, 1931, and was renewed by agreement for a further three years from the 1st of January, 1934. It is administered by an International Tin Committee consisting of representatives of the four Governments mentioned above; Siam, France and Belgium are also represented on the Committee. The principle on which the scheme is based is the adjustment of the production of tin to its consumption by the regulation of output. This is achieved by allocating quotas to the four territories named above, which are based on the actual output of 1929 subject to certain minor adjustments, and by restricting production to a percentage of those quotas which is varied from time to time. For Siam, French Indo-China, the United Kingdom, the Belgian Congo and the Portuguese Colonies special arrangements, fixing the maximum production for any given year, have been made. In 1931 the original intention was to restrict world production to 145,000 tons, of which just over 126,000 tons was to be produced in the four territories. Malaya's share of world-production was fixed at 37.19 per cent. and Nigeria's at 5.52 per cent. Actually owing to an excess of production in the first two months of the year, world production for 1931 was kept down to 149,000 tons only by a further reduction in the quotas of the four territories for the last six months of the year. Siam adhered to the scheme with a fixed quota of 10,000 tons per annum, not subject to reduction, in September, 1931.

Even with these restrictions, however, stocks continued to increase owing to a very heavy decrease in consumption and further cuts of production were made during 1932; world production in 1932 only amounted to about 100,000 tons and a small decrease in stocks was effected in that year. During 1933 there was some revival in consumption and, as production was still severely limited (production in the four territories being limited in the latter months of the year to no more than 33½ per cent. of the quota), stocks were reduced by 26,768 tons during the year and the London price of tin had advanced to just over £225 per ton by the 31st of December. The production quota was therefore increased to 40 per cent. as from the 1st of January, 1934.

During 1934 consumption decreased slightly, and although production was increased under the quota, the demand was still greater than the supply, and the stocks were further reduced by the end of the year to 17,107 tons. The price of tin in London during 1934 averaged about £215 sterling. The production quota remained at 40 per cent. until the quarter beginning the 1st of January, 1935, but was increased to 45 per cent. as from the 1st of April, 1935.

The tin ore and concentrates produced in East and West Africa are shipped overseas for smelting, but those produced in Malaya are smelted at Penang or Singapore.

In these circumstances Table XIV*, which shows total exports or production of tin in the Colonial Empire, has had to be prepared in a special form. The exports of tin ore and concentrates from African Dependencies are taken from the usual trade returns and show countries of destination. The exports of tin from the Federated Malay States and the production in other parts of Malaya are taken from the Annual Reports and show the total quantity of metallic tin produced in Malaya and the local value thereof.

Total production in terms of metallic tin during the years 1930 to 1933 may be summarized as follows:—

				1930 Tons	1931 Tons	1932 Tons	1933 Tons
Federated Malay States	...	...	...	62,065	53,457	28,363	23,925
Straits Settlements	...	...	...	5	16	38	57
Unfederated Malay States	...	...	...	1,910	1,436	1,341	923
<i>Total—Malaya</i>	...	...	...	63,980	54,909	29,742	24,905
Nigeria	...	...	...	8,570	7,056	4,320	3,755
Uganda	...	...	...	266	108	261	272
Tanganyika Territory	...	...	...	7	14	50	49
GRAND TOTAL	...	...	...	72,823	62,087	34,373	28,981

* See page 546.

Copper.—Northern Rhodesia contains one of the richest and most valuable bodies of copper ore in the world and copper is now its principal export. Some account of the development of these resources will be found in Section V.A.4* of the memorandum on Northern Rhodesia in Part I.

These resources are still in the early stages of development, but progress during recent years has been extraordinarily rapid. In 1930 the production in Northern Rhodesia amounted to about one-half of one per cent. of the estimated world-production of copper; by 1932 this figure had increased to about 10 per cent., and in 1933 to about 13 per cent.

Details of exports will be found in Table XVII†; the values may be summarized as follows:—

	£		£
1929	236,716	1932	2,087,620
1930	226,382	1933	3,114,618
1931	505,204		

In 1932 copper became for the first time one of the major exports of the Colonial Empire.

The production of copper and cupriforous pyrites in Cyprus is a very old-established industry; indeed while the etymological connexion between "Cyprus" and "copper" is regarded as certain, it is not clear whether the mineral was called after the island or vice versa. The industry is still in existence but now supplies only a very small share of world production.

Copper ore occurs in the Federated Malay States, Kenya, Uganda, Nyasaland, Jamaica, and Fiji. The Ruwenzori district of Uganda is at present being actively prospected for copper, and important tonnages have already been proved.

Taking the value of the exports from Northern Rhodesia as shown above and that of the exports of copper precipitate and cupriforous pyrites from Cyprus as shown in Table XVII‡ the value of the total annual value of the copper production of the Colonial Empire in recent years may be estimated as follows:—

	£		£
1929	518,904	1932	2,254,172
1930	475,268	1933	3,309,882
1931	609,954		

Gold.—The only Colony with an old-established gold-mining industry of appreciable importance is the Gold Coast.

The industries in the Federated Malay States and British Guiana have been established for a number of years, but the output has never been very substantial.

The rise in the sterling value of gold during the last three years has, of course, improved the prospects of gold-mining in all those territories in which gold is known to exist and in particular has encouraged substantial developments in Tanganyika Territory, Kenya, Nigeria and Sierra Leone; it is possible that really important industries may be established in these territories.

Other Dependencies in which there is a small established industry are Uganda, Northern Rhodesia, Kelantan, Trengganu, Sarawak and Fiji. Traces of gold have been found in Nyasaland, Somaliland, Johore, North Borneo, and Trinidad, but it is not yet certain whether gold in commercial quantities exists in any of these territories.

The following table shows the production or (in the case shown) the exports of gold of various Dependencies of the Colonial Empire for the years 1929 to 1933 in order of importance.

The figures have been reduced to fine ounces troy and will therefore be found not to agree in all cases with the figures in the export returns, which are sometimes expressed in ounces of less fineness:—

	1929	1930	1931	1932	1933
Gold Coast	207,851	240,899	261,651	278,782	305,908
Tanganyika Territory	9,071	11,072	12,728	25,687	39,532
Federated Malay States	26,782	29,597	27,021	27,159	28,973
British Guiana	6,200	6,364	10,183	13,926	23,352
Sarawak	691 (exports)	3,000 (exports)	5,900	8,178	18,712
Nigeria	192	260	699	2,701	17,718
Sierra Leone	—	720	5,700	10,500	14,484
Kenya	845	1,789	3,169	10,987	14,142
Northern Rhodesia	699	7,511	9,364	6,349	2,588
Unfederated Malay States	—	—	—	289	2,131
Fiji	—	—	—	311	1,842
Uganda	—	—	71	586	1,200
Total Colonial Empire (approximate)	252,300	301,200	336,500	385,500	470,600
Total British Empire (approximate)	14,100,000	14,600,000	15,550,000	16,860,000	16,560,000
Total world (approximate) (excluding U.S.S.R.).	18,700,000	19,500,000	22,400,000	22,400,000	22,400,000

It will be seen that in 1933 the production in the Colonial Empire was approximately 2·1 per cent. of total world production.

Owing to the rapid fluctuations in the rate of exchange since the United Kingdom departed from the gold standard in September, 1931, it is difficult to state the exact value of this production, but, taking the average London price of gold for the year, the value of the fine ounce troy may be taken at £4 4s. 10½d. for 1929 and 1930, about £4 12s. 6d. for 1931, about £5 18s. for 1932, and £6 4s. 10d. for 1933. On this basis the approximate values are as follows:—£1,070,800 in 1929, £1,278,200 in 1930, £1,556,300 in 1931, £2,274,450 in 1932 and in 1933, £2,937,300. The figures for 1934 will show a further increase.

* See page 53.

† See page 549.

‡ See page 550.

Manganese is produced in substantial quantities in the Gold Coast. Indeed during recent years this Colony has been the second largest world producer of manganese ore. It will be seen from the figures in Table XVII* that the amount exported has fluctuated violently in recent years. In 1930 it was as much as 417,000 tons valued at £823,000. In 1932 it had dropped to 51,000 tons valued at £124,000, but increased in 1933 to 265,140 tons valued at £357,366.

There is also fairly substantial production in Trengganu, but exports dropped from about 20,000 tons valued at over £19,300 in 1930 to about 10,000 tons valued at about £9,600 in 1933.

Manganese is produced in Northern Rhodesia and is known to occur in the following Dependencies:—Tanganyika Territory, Nyasaland, St. Helena, the Federated Malay States, Kelantan, North Borneo, Cyprus, British Guiana, and the New Hebrides, but except in Kelantan the deposits are not at present being exploited.

Bauxite, or aluminium ore, is produced in fairly substantial quantities in British Guiana, but owing to the recent depression production, which is controlled by a regulation scheme, has recently been much below potential output. Figures of exports for recent years will be found in Table XVII*.

Bauxite is also known to exist in Nyasaland, the Gold Coast, Sierra Leone, and the Federated Malay States but these deposits are not at present being worked.

Vanadium ore has been produced in substantial quantities in Northern Rhodesia, but production was suspended in 1933.

Zinc ore is known to exist in large quantities in Northern Rhodesia. Exports in earlier years have been very substantial but in 1932 practically ceased owing to the low price of the metal. In 1933 there was a great recovery, some 16,425 tons valued at £275,834 being exported. Zinc ore is also known to exist in Kenya, Nigeria, Trengganu, and North Borneo. The remaining metals and metallic ores can most conveniently be arranged in alphabetical order; none of them is at present of any substantial economic importance.

Barite is known to exist in Kenya.

Chrome Iron Ore is produced in Cyprus, but the production has always been less than 0.5 per cent. of world production, and has recently been discontinued. It also occurs in Sierra Leone and North Borneo.

Cobalt Ore is found in Tanganyika Territory and Uganda and crude cobalt alloy is now being produced in large amounts in Northern Rhodesia, and is sent to Europe for the production of cobalt metal and oxide.

Ilmenite, the raw material for the manufacture of titanium-white paint, occurs in large quantities in Sierra Leone, Ceylon, the Federated Malay States, and Kedah. So far there has been small production in Sierra Leone and the Federated Malay States only, but with increasing demand for this new pigment developments may well proceed more rapidly.

Iron ore is produced in substantial quantities in the Unfederated Malay States (Johore, Kedah, Kelantan, and Trengganu) and in small quantities in Northern Rhodesia. There are extensive deposits in Sierra Leone, and production on a large scale began in 1933. In 1934 exports reached a total of 210,645 tons. It is also known to exist in Kenya, Nyasaland, Nigeria, Ceylon, the Federated Malay States, North Borneo, Mauritius, and Trinidad.

Lead ore is produced in small quantities in Nigeria and has been produced in Northern Rhodesia. It is known to exist in Kenya, Nyasaland, and Trengganu.

Molybdenite occurs in Kenya, the Gold Coast, Sierra Leone, and the Virgin Islands.

Monazite (Thorium) is known to exist in Ceylon (where it was formerly worked), Nigeria, the Federated Malay States, Kelantan, and Trengganu.

Nickel ore is known to exist in Tanganyika Territory and Uganda.

Platinum is produced in small quantities in Sierra Leone and has been identified in Somaliland and Kenya.

Pyrites of the cupriferous variety is produced in Cyprus.

Silver is produced in fairly substantial quantities in Nigeria and in small quantities in Kenya, Tanganyika Territory, Northern Rhodesia, the Gold Coast, the Federated Malay States, and British Guiana, but the total production of the Colonial Empire in 1933 was only in the order of 136,000 fine ounces (of which about 85 per cent. was produced in Nigeria) out of a total world production of about 146 million fine ounces. The silver produced in Nigeria is exported in a compound silver-lead ore.

Tungsten ore occurs in the form of *Scheelite* in the Federated Malay States and Trengganu, and in the form of *Wolfram* in those Dependencies and Kedah, but the WO₃ content of the total amount produced in 1933 was only a little over 750 tons.

II.—Precious Stones.

Diamonds are the most important precious stones found in the Colonial Empire, the fields being situated in four territories.

In the Gold Coast there are large deposits, which have been known since 1919; commercial exploitation started in 1920. The stones obtained are on the average very small, and although the total output to the end of 1933 was 5,668,000 carats, the largest stone weighed less than 3 carats. The average size of the diamond crystals recovered is about 20 to the carat, and they are mainly employed for industrial purposes and in the "small" jewellery trade. There are now two companies working on a large scale and two others on a smaller scale. The output has advanced by leaps and bounds since the industry commenced, and the Gold Coast now takes a prominent place among producing countries.

* See page 549.

In Sierra Leone diamonds were first found in 1830. The country in the vicinity of these discoveries has been prospected by the Consolidated African Selection Trust with encouraging results. The stones recovered are larger and more valuable than those in the Gold Coast; commercial exploitation hardly began till 1933, but in that year exports amounted to nearly 27,000 carats.

Isolated diamonds have been found from time to time in Nígeria, but no substantial deposit has yet been located.

In British Guiana diamonds were first found as long ago as 1887 but the development of diamond production has been very slow. The proved diamondiferous area is very large. Production did not reach 10,000 carats a year until 1902, and then declined again to about 2,000 carats in 1908. From that time, however, it steadily rose until 1919, when nearly 17,000 carats were obtained and then very rapidly to a peak of 200,000 carats in 1923. Since then it has decreased steadily and at the end of 1933 the output was only 48,500 carats.

Stones obtained from different localities vary considerably in size, form and quality. The average size for the whole country is about 6 to the carat, but each year a few stones exceeding 10 carats each are found. The largest stone ever found weighed 56 carats.

In Tanganyika Territory diamond claims were pegged as long ago as in 1910, but there was no important production till 1925. There followed a period of intensive development, but production has since rapidly decreased owing to the exhaustion of certain areas. There are still several known diamondiferous areas which have not been tested on a commercial scale and the future of the industry is very uncertain.

The largest stone hitherto produced in Tanganyika Territory weighed 92½ carats and the most valuable one was one of 37½ carats valued at £1,698 15s.

In 1930 the average weight of the stones produced was three-quarters of a carat.

Table XVI* shows the total quantity of diamonds exported from the Colonial Empire during the years 1930 to 1933. Both quantities and value differ slightly from the estimate of actual production during the same years prepared by the Imperial Institute which may be summarized as follows:—

				Quantity in '000 metric carats			Value in £'000		
				Colonial Empire	British Empire	World‡	Colonial Empire	British Empire	World‡
1929	...	...	...	811	5,071	7,290	1,146	13,800	15,100
1930	...	...	...	983	4,564	7,410	1,008	10,600	11,700
1931	...	...	...	952	3,144	7,030	656	5,000	6,000
1932	...	...	...	906	1,724	5,970	658	2,400	3,600
1933	...	...	...	887	1,399	4,030	718	2,300	3,200

‡ Excluding Brazil for which no reliable statistics of production are available.

It will be seen that in spite of the decline in world production Colonial production has been well maintained. This is due to the sustained demand for the small industrial type of diamond, which makes up the greater part of the Colonial output.

As regards precious stones other than diamonds, supplies are known to exist only in a comparatively limited number of Dependencies.

Ceylon is the most important producer, the varieties found including *sapphire*, *ruby*, *chrysoberyl*, *spinel*, *zircon*, *topaz*, *garnet*, *beryl*, *tourmaline*, *sphene*, *rutile*, *cordierite*, *sillimanite*, *andalusite*, *diopside*, *apatite*, many varieties of *quartz* and *moonstone*.

As stated in the memorandum on Ceylon† in Part I it is impossible to frame an accurate estimate of the total output. For the purposes of the general tables at the end of this memorandum the rough estimate of £150,000 annually has been accepted.

In Tanganyika Territory *almandine-pyrope* ("Cape ruby") deposits are known to exist and were worked on a small scale till 1928. *Pyrope*, *beryl*, *amethyst*, *phenakite*, and *moonstone* have also been discovered.

III.—Petroleum, coal, asphalt and other similar minerals.

Crude petroleum is produced on a large scale in Trinidad, Sarawak and Brunei and on a smaller scale in the State of North Borneo and Barbados.

Particulars of production, etc., will be found in the memoranda relating to those territories.

Refineries exist in Trinidad and Sarawak, and both crude and refined products are exported from those territories. The crude oil from Brunei is conveyed to the Sarawak refinery by pipe line.

Trinidad is the largest petroleum producer in the British Empire, its production being some 10 per cent. greater than that of India, but the total production of the Colonial Empire is less than one per cent. of world production.

Table XV‡ shows all domestic exports of petroleum and petroleum products from the Colonial Empire in the years 1930 to 1933.

Natural lake asphalt is produced in Trinidad, this Colony being the only important producer of this product.

An allied product known as *manjak* exists in Barbados, but exploitation of these deposits has practically ceased.

Coal is found in a number of Dependencies.

There are large fields of coal of good quality in Nigeria and production for use in the territory and export to the Gold Coast runs from about 250,000 to 350,000 tons annually.

Production during recent years has been as follows:—

				Tons	£					Tons	£
1929	...	...	...	344,937	142,288	1932	...	...	...	252,485	102,552
1930	...	...	...	347,812	130,441	1933	...	...	...	235,133	88,175
1931	...	...	...	327,681	102,552						

* See page 548.

† See page 161.

‡ See page 547.

There are also large fields in the Federated Malay States and production during recent years has varied from 600,000 to 250,000 tons annually. As nearly all the coal is consumed within Malaya production depends entirely on the degree of local industrial activity.

Production during recent years has been as follows:—

		<i>Tons</i>	<i>£</i>			<i>Tons</i>	<i>£</i>
1929	...	661,614	979,687	1932	...	277,848	283,058
1930	...	565,573	804,538	1933	...	234,410	232,601
1931	...	402,355	454,872				

The value of the coal produced is not shown in the Annual Reports, and the values in this table have therefore been calculated at the value of the coal exported each year, which may well be above the actual value of the coal produced for domestic use.

Coal has been produced in moderate quantities in North Borneo and Sarawak, but these mines are now shut down.

Coal is known to exist, but is not at present being worked in Tanganyika Territory and Nyasaland, where extensive deposits have been found, and also in Somaliland, Perlis, Brunei, Trinidad, and the New Hebrides.

Large deposits of lignite (brown coal) of good quality have been found in Nigeria.

The figures of production mentioned above are of course insignificant compared with the total world production of between 1,100 and 1,400 million tons annually.

Taking the value of production shown above and of exports shown in Table XVII* the total value of the production of coal in the Colonial Empire during recent years has been as follows:—

		1930	1931	1932	1933
		<i>£</i>	<i>£</i>	<i>£</i>	<i>£</i>
Nigeria	...	130,441	102,552	102,552	88,175
Federated Malay States	...	804,538	454,872	283,058	232,601
North Borneo	...	41,813	24,027	13,749	5,286
Sarawak and Brunei	...	—	1,901	204	72
Total	...	976,792	583,352	399,563	326,134

IV.—Other Minerals.

Other mineral products of the Colonial Empire are relatively of little importance.

Building stone, including such substances as coral rock and limestone, is quarried in a number of territories, generally for domestic use only, and marble of good quality is found in Kenya, Tanganyika Territory, the Federated Malay States, and Kedah.

Other minerals can most conveniently be arranged in alphabetical order.

Abrasives.—**Corundum** exists in small quantities in Kenya, Nyasaland, Sierra Leone, and the Federated Malay States but is not at present being exploited.

Arsenical ores occur in the Federated Malay States, and appreciable quantities of white arsenic have been produced from time to time at the Beatrice Mine.

Asbestos exists in important quantities in Cyprus, but exports have diminished seriously in recent years.

Bromine exists in large quantities in solution in the waters of the Dead Sea in Palestine and is now being recovered by an evaporation process.

Diatomaceous earth exists in large quantities in the Rift Valley districts of Kenya, but high transport costs are an obstacle to its exploitation.

Graphite or Plumbago.—Ceylon is the only important Colonial source of plumbago. The deposits have been exploited for many years and the trade was at one time an important one, but it has become greatly depressed in recent years. Ceylon, however, still produces nearly 10 per cent. of the total world output.

Plumbago is also known to exist in Kenya, Tanganyika Territory and Nyasaland, but is not worked in those Dependencies.

Gypsum is found in Cyprus, Palestine, Kenya, Montserrat, and Trinidad, but the amounts produced are insignificant compared to the total world output (about one-tenth of one per cent.).

Kaolin or China Clay has been exploited from time to time in Uganda, Ceylon, and the Federated and Unfederated Malay States; deposits are known to exist in Tanganyika Territory, the Gold Coast, Nigeria, and British Guiana.

Mica is produced in Kenya, Tanganyika Territory, and Ceylon but production is very small in all these areas.

Phosphates.—There are large deposits of rock phosphate in Ocean Island (Gilbert and Ellice Islands Colony) and the Colony is almost entirely dependent on their exploitation. Next to Nauru, this Colony is the most important Empire producer of rock phosphate.

Substantial deposits are also worked on Christmas Island (Straits Settlements).

Natural guano is one of the principal exports of Seychelles.

Potash exists in enormous quantities in solution in the waters of the Dead Sea, Palestine, and is recovered by an evaporation process in the form of *carnallite*. Production on a commercial scale began in 1931 and, in spite of the most intense competition, the industry is making substantial headway.

Salt is produced in a number of Dependencies by the evaporation of sea water.

The largest producer is the Turks and Caicos Islands which are almost entirely dependent on their salt exports, the production varying from about 20,000 to over 40,000 tons a year. The next largest producer is Ceylon with an annual production of from 10,000 to 45,000 tons a year. Other

* See page 549.

producers are the Bahamas (production very variable from 12,000 to 250 tons a year), Tanganyika Territory (6,000 to 7,000 tons a year), Cyprus (about 3,000 tons a year), Somaliland (nearly 3,000 tons a year), Uganda (up to nearly 2,000 tons a year), Mauritius (about 1,500 tons a year), Malta (about 1,200 tons a year), the Leewards Islands (between 2,300 and 800 tons a year), Nigeria (about 400 tons a year), and Grenada (under 200 tons a year).

In Palestine there is a production of about 6,000 tons a year by the evaporation process, but there are also large deposits of rock salt which are exploited to a small extent (1,200 to 1,300 tons a year).

The figures quoted are not impressive compared to a total world production of from 25 to 28 million tons annually.

Soapstone is known to exist in Sierra Leone.

Sodium carbonate.—The only important source of sodium carbonate in the Colonial Empire is the Magadi salt lake in Kenya, where sodium carbonate is produced by a process of evaporation.

Production is in the hands of the Magadi Soda Company which is controlled by Imperial Chemical Industries, Limited, who also control the United Kingdom supplies. The Kenya product is inferior in quality to the United Kingdom (Cheshire) product and finds a market principally in the East, especially Japan.

(Native) Sulphur is known to exist in Trengganu and the New Hebrides.

Terra umbra and Terre verte are produced in small quantities in Cyprus.

Summary.

It is impossible to state with precision the annual value of the mineral production of the Colonial Empire, but as nearly all production is for export, a much closer approximation is possible than in the case of other kinds of production.

Taking the estimates quoted in preceding paragraphs of this memorandum where more precise information is not available and including under the head of "other" all the exports shown in Table XVII*, except coal and copper, the following table gives an approximation to the total value of the production in the Colonial Empire of all minerals except building stone, limestone and similar products:—

	1930	1931	1932	1933
	£	£	£	£
Tin	10,656,000	7,064,000	4,441,000	5,302,000
Petroleum	4,475,000	2,986,000	3,257,000	3,107,000
Gold	1,278,000	1,556,000	2,274,000	2,937,000
Copper	475,000	700,000	2,254,000	3,310,000
Coal	977,000	583,000	400,000	326,000
Diamonds	1,008,000	556,000	658,000	718,000
Other precious stones (Ceylon estimate)	150,000	150,000	150,000	150,000
Other	3,264,000	2,211,000	1,679,000	2,209,000
Total	22,283,000	15,806,000	15,113,000	18,059,000

OIL-SEEDS AND NUTS AND VEGETABLE OILS.

"Oil" is a term used loosely to include three separate groups of commodities, which differ in many important chemical and physical properties, viz., the "mineral oils," which are included under the heading of "Minerals" in this volume, the "Essential" or "Volatile oils," to which a separate memorandum is devoted, and the great group of "fixed" or "fatty oils".

Fatty oils are largely vegetable in origin and are obtained from the seeds and nuts, in some instances other parts, of a number of trees and plants. At least thirty different trees and plants have been used for the production of oil on a commercial scale and a much larger number of varieties is known to contain oil which is not produced commercially. Whale oil and seal oil, which are included under "Marine products" in this volume, and several kinds of fish oil fall within the same group. The animal products—butter, lard, and tallow—still remain the principal individual fats of commerce, and it is owing to the increasing demand for fats and the failure of animal fats, at any rate for a time, to keep pace with the increase in demand that vegetable oils and fats have developed so enormously.

The study of the trade in oil-seeds and nuts is one of outstanding difficulty for a number of reasons.

In the first place many of these products are used in their natural form as foodstuffs in the countries in which they are grown, and it is, therefore, very difficult, if not impossible, to discover what the annual output is. Moreover, as consumption for this purpose is relatively inelastic, any fluctuations of supply make a disproportionately large difference in the supplies available for crushing.

In the second place, as shown below, there is a large measure of interchangeability between the various products of the group, so that the effect of variations in supply and demand on the price of the individual product is unusually intricate.

In the third place most of the raw products are converted, when crushed, into two commodities, oil and cake or meal; different products yield these two commodities in different proportions and the cake derived from certain products is interchangeable with the cake derived from certain other products, although the respective oils are not interchangeable, and vice versa.

* See page 549.

In the fourth place, in considering actual and potential production, difficulties arise owing to the wide distribution of the producing areas, to the fact that production goes on at every season of the year and that several of the products concerned are either by-products of a more important crop (cotton-seed) or permanent and semi-wild crops (coconuts and oil-palms), so that the amount of physical production is only very slowly affected by variations in price.

There are also other sources of difficulty and, all things considered, it is doubtful whether there is any other group of commodities regarding which it is more difficult to ascertain all the facts or to understand the implications of those facts when ascertained.

The principal uses of fatty oils are the following:—

- (1) for the manufacture of margarine;
- (2) for the manufacture of cooking oil and compound lard or edible fat, and for other culinary purposes;
- (3) for the manufacture of soap, detergents and glycerine;
- (4) for the manufacture of paint, varnishes, and linoleum;
- (5) as lubricants;
- (6) for other industrial purposes, such as the manufacture of candles and lighting oil.

No fatty oil is equally suitable for all these purposes, but by the application of such processes as hydrogenation certain oils have now been made suitable for certain purposes for which they were not previously available, and there is now no oil for which there are not several alternative uses, equally there are no important uses for which several alternative oils are not available.

For the manufacture of margarine many fatty oils are used, the more important roughly in order of importance being the following:—Cotton-seed oil, soya-bean oil, groundnut oil, coconut oil, and palm-kernel oil together with lard, edible tallow and whale oil. Palm oil, sunflower-seed oil and sesame oil are also utilized.

For other edible purposes the same list will serve with the addition of olive oil, but the order of importance of the items is somewhat different.

For the manufacture of soap the margarine list will serve with the addition of olive oil, linseed oil, and inedible tallow and the exclusion of lard. Palm oil becomes of major and cotton-seed oil of minor importance.

For the manufacture of paint, varnishes, and linoleum a drying oil, that is one possessing rather different qualities from those mentioned above, is required. Linseed oil and tung oil (also called "Chinese wood oil") are the most important representatives of this group, which also includes soya-bean oil as a cheap substitute in inferior paints.

For lubricants again special qualities are required which are possessed only by certain vegetable oils, the most important of which are castor and rape oil. Most lubricating oils are of mineral origin or contain a very high percentage of mineral oils.

One or two members of the group are used for other industrial purposes, for instance tallow, in particular, for candle-making, palm oil as a flux in tin-plating, certain oils in various textile processes and for dressing leather and colza or rape-seed oil as an illuminant. Other oils such as palm oil and coconut oil are used as illuminants in the country of origin.

Nearly all the vegetable fatty oils are produced by crushing or expressing the seeds and other parts of the plant in which the oil is contained or by extracting the oil with solvents. The solid residuum which is left is used in most cases as food for stock under the name of oil-cake or meal. The most important of these cakes and meals are cotton-seed, soya bean, groundnut, linseed, and coconut, but others are also used extensively. In Eastern countries some of these cakes are also used as fertilizers. Very often several residual products are mixed together into a "compound cake" containing, or claiming to contain, a "balanced ration" of foodstuffs of various special characteristics.

Many oil-seeds and nuts are also used for human consumption in their uncrushed form, particularly coconuts, groundnuts, and olives. There is also a large consumption in some parts of the Colonial Empire of the oils obtained by simple native methods of crushing, e.g., sesame. Export for crushing overseas is frequently only incidental.

In giving an account of the principal oil-seeds and nuts perhaps the most convenient order in which to arrange them is by reference to the weight of the annual crop.

If the oil-seeds and nuts be classified in this order the most important is cotton-seed, which is a by-product of cotton production.

After the seed necessary to plant the new crop has been reserved, the whole of the rest is available, and normally used, for crushing except in those producing areas which are so situated that the cost of transport to the market is so high as to render the operation unprofitable.

It was estimated by the Empire Marketing Board that the average total annual production of cotton-seed for the whole world during the years 1926 to 1930, including an estimated production of about two million tons in China, was between 12 and 12½ million tons. Messrs. Frank Fehr and Company's estimate of production in 1933, excluding China, is rather over 8½ million tons, of which it is estimated that about 7 million tons were crushed. The seed yields on crushing about 18 per cent. by weight of oil and 82 per cent. of cake or meal. The estimated production of cotton-seed oil in 1933 was therefore in the region of 1,260,000 tons.

Some particulars of the area under cotton in the world and in the Colonial Empire will be found in the memorandum on cotton*. It will be seen that only about one to one and a-half per cent. of the world acreage of cotton is within the Colonial Empire and that Uganda is the only Dependency with a cotton industry of substantial dimensions. Apart from two very small installations in Barbados and the Leeward Islands there are no cotton-seed crushing mills in the Colonial Empire and with the exception mentioned above all seed destined for crushing has to be exported, chiefly to the United Kingdom.

* See page 467.

Table XXII* shows the total exports of cotton-seed from the Colonial Empire during the years 1930 to 1933. It will be noted that they rose from nearly 54,000 tons in 1930 to over 90,000 tons in 1933, having steadily risen in the intervening period, but that the value fell from over £373,000 to over £302,000. These exports are about 1 per cent. of world production.

Soya bean comes next after cotton-seed in bulk. It is a leguminous vegetable indigenous to Eastern Asia and is grown as an annual crop. The principal source of supply is still China (particularly Manchuria) but the actual amount of production there is uncertain, since estimates vary greatly and in some cases include other kinds of beans as well as soya beans. The plant is often grown for forage purposes and made into hay, and very large quantities of the beans are crushed locally and the oil used for human food. Considerable quantities of soya beans are also grown in the United States of America (where production, both for forage and for oil, has recently been increasing rapidly), Korea, Japan, and Russia and to a small extent in Java. Attempts have been made to cultivate it in South Africa, Australia, and India. So far as the Colonial Empire is concerned, production has only been experimental and in most cases has not been very promising. It is possible, however, that a substantial production might be developed in Nyasaland, if the price were sufficiently high compared to the cost of transport.

The world output of soya beans in 1934 was estimated by Messrs. Frank Fehr and Company at about 5½ million tons (including about 4½ million tons produced in China) of which about 4½ million tons were available for crushing. As soya beans, when crushed, yield about 15 per cent. of oil and 85 per cent. of cake the total production of soya-bean oil in 1934 can be estimated at about 638,000 tons.

Groundnuts come third in importance by bulk. The groundnut is a leguminous vegetable which can be grown as an annual crop on light soils in almost any tropical or sub-tropical country. As well as being used as an oil-seed it is used as a foodstuff not only as a staple in the countries of production but also as a dessert nut in European and American countries under the name of "peanut" or "monkey nut".

The groundnut is exported in two forms "undecorticated", that is in the shell, and "decorticated". The shell, which represents about a quarter by weight of the nut, is commercially valueless and in using statistics relating to undecorticated nuts it is necessary to deduct the weight of the shell before they can be made comparable with other statistics. The oil extracted from undecorticated nuts is used mainly in the manufacture of edible commodities, such as margarine, salad and frying oils, while the oil from decorticated nuts is mainly used in soap making.

No available statistics of production, as opposed to export, are available for most African countries or China, in both of which areas groundnuts are grown extensively for local consumption and it is possible that if total production figures were available they might show a larger amount than the annual production of soya beans. Messrs. Frank Fehr's estimate of world production in 1934, disregarding production for internal consumption in British West Africa and China is about 4,170,000 tons, of which 3 million tons were available for export. The oil content of the nut varies in different varieties. In some it is as high as 48 per cent., but not the whole of this can be extracted, and allowing for this fact, for the lower proportion of oil in certain varieties and for the fact that the oil content has to be reduced by a quarter in the case of undecorticated nuts, Messrs. Frank Fehr and Company use an average figure of 36 per cent. for calculating the oil content of groundnuts. On this basis the oil equivalent of 3 million tons of nuts was 1,080,000 tons.

Of the quantities which enter into world-trade more than half are produced in India. Of the whole Indian crop less than a quarter is normally exported in the raw form, but there are also Indian exports of groundnut oil, and if the equivalent in raw material of this oil is taken into account about one-third of the whole Indian crop can be regarded as grown for export.

So far as the Colonial Empire is concerned production is centred chiefly in East and West Africa, but small quantities are also grown in Malaya, Mauritius, Hong Kong, and St. Vincent.

In Kenya, Uganda, and Tanganyika Territory groundnuts are one of the subsidiary native food crops. The area under this crop in Kenya is unknown; in Uganda the estimated area in 1933 was over 126,000 acres, and in Tanganyika Territory about the same. Exports from Tanganyika Territory fluctuate violently but tend to be substantial, those from Kenya and Uganda are much smaller. In Nyasaland, Northern Rhodesia, and Zanzibar production is of much less importance and exports are negligible.

In West Africa groundnuts are one of the most important products both for local consumption and for export.

In Nigeria the production is centred in the extreme north of the Protectorate. Total production is unknown but exports have been steadily increasing for some time past owing to improvements in transport facilities and rose in 1933 to a total of nearly 205,000 tons (or over 6 per cent. of the total amount which enters world-trade) valued at about £2,064,000. At this figure groundnuts were the second most valuable export and represented over 24 per cent. of total domestic exports in 1933.

In the Gambia groundnuts are an important native foodstuff and almost the only export crop, exports in 1933, over 67,000 tons valued at nearly £501,000, representing nearly 99 per cent. of total domestic exports.

In the Gold Coast and Sierra Leone groundnuts are a native foodstuff of secondary importance and exports are negligible.

A few hundred acres are under groundnuts in Hong Kong, the Federated Malay States, Johore, Kelantan, Perlis, and Mauritius, but cultivation in these Dependencies is solely for local consumption.

In the West Indies, St. Vincent alone appears to be a producer for export, some 30 tons having been grown in 1933 of which two-thirds was exported.

* See page 554.

The total exports of groundnuts from the Colonial Empire in the years 1930 to 1933 are shown in Table XXIII.* It will be noted that the amount increased from 245,000 tons in 1930 to over 292,000 tons in 1933 but that the value dropped from over £3,300,000 to a little under £2½ million.

It may be assumed that almost the whole of the exports from Nigeria and East Africa are of decorticated and the whole of the exports from the Gambia of undecorticated nuts. The exports of the Colonial Empire may therefore be taken to be about 6 per cent. of the total world-production available for crushing. A full account of the trade will be found in a recent publication of the Imperial Economic Committee (Survey of Oilseeds and Vegetable Oils, Volume III. Ground Nut Products. October, 1934).

Fourth in order of importance by bulk comes the olive, which yields a superfine oil and stands rather apart from the other products in the group. It is grown almost exclusively in the Mediterranean countries and production varies greatly from year to year, being much affected by climatic conditions. The estimated annual output for the period 1927-28 to 1932-33 averaged about 4 million tons, of which Spain accounted for 2 millions and Italy for about 1½ millions. Messrs. Frank Fehr and Company's estimate of the production for 1934 is 3,800,000 tons, of which only about 1,300,000 tons, yielding (on a basis of 50 per cent. of oil) about 650,000 tons of oil, were available for crushing. The remainder of the crop is consumed in the countries of production. The oil is, generally speaking, a high class commodity used for human consumption, for the most part in the countries of production, and for the manufacture of the more expensive kinds of soap. The result is that this oil has little influence on the remainder of the group, but has been replaced to some extent and for certain purposes by the cheaper vegetable oils.

Olive oil is of little importance in the Colonial Empire. Production is confined to Cyprus and Palestine.

Fifth in order of importance by bulk comes linseed, the seed of the flax plant. There are several varieties of the plant, and generally speaking those which give a high yield of good seed produce poor fibre and those grown for fibre are not particularly suited for seed production. Linseed grown for fibre is as a rule pulled before the seed is fully ripe.

Linseed is an annual crop and the amount produced fluctuates a good deal. It stands rather apart from other oils, since, while linseed cake is readily interchangeable with other oil-cakes in stock foods, the oil is a "drying oil", used almost entirely for the manufacture of paint, varnish, and linoleum, and is therefore interchangeable only to a limited extent with other vegetable oils.

Messrs. Frank Fehr and Company estimate that in 1934 the total world-production was about 3,311,500 tons of which 2,800,000 were available for crushing, yielding (on a basis of 30 per cent. of oil) about 840,000 tons of oil.

About half the total amount of world-production of the seed is grown in the Argentine; Russia and the United States of America each produce about a sixth of the world's supplies.

So far as the Colonial Empire is concerned linseed is of negligible importance. There are very small exports from Cyprus and Kenya, but the total value in 1933 was just under £5,000.

Sixth in order of importance by bulk comes sunflower-seed. Almost the whole commercial crop is produced in Russia and about half is crushed. Hitherto almost the whole crop has been consumed in the country of production, and it has therefore had little direct effect on the price of other oil-seeds, but the oil has recently been appearing on the world-market in increasing quantities. The annual crop is estimated very roughly at 2½ million tons and the amount crushed at 1½ million tons, representing (on a basis of 30 per cent. of oil) about 375,000 tons.

This oil-seed is not produced for export in the Colonial Empire, though a little is grown for local use as a cattle food in Northern Rhodesia and Kenya.

Seventh in order of importance by bulk comes copra, the dried flesh of the coconut. The total amount of copra produced annually cannot be ascertained, but it is estimated by Messrs. Frank Fehr and Company that at least 1,245,000 tons entered world-trade in 1934 of which 1,230,000 tons were available for crushing yielding (on a basis of 63 per cent. of oil) about 775,000 tons of oil, to which must be added another 225,000 tons produced in the countries where coconuts are grown.

It is not, however, possible to discuss copra without at the same time taking account of the other coconut products which are important to the Colonial Empire, viz., fresh coconuts, desiccated coconut, coconut cake, and coconut oil. (Another coconut product, coir, the fibres of the husk, is dealt with in the memorandum on Fibres.† Other coconut products, such as toddy are of domestic importance only since they are not exported). Some account of these products and the method of their preparation will be found in the memorandum on Ceylon,‡ and a full account of the whole trade will be found in a publication of the Empire Marketing Board (Survey of Oil-seeds and Vegetable Oils. Vol. II Coconut Palm Products. December, 1932).

Coconuts are a permanent crop and the quantity of coconuts coming to maturity annually is more or less constant, apart from new plantings and variations due to climatic conditions, particularly drought and hurricanes.

Coconuts are grown over a very wide area in tropical countries and it is estimated very roughly that some 7½ million acres are under coconut palms. The palm does best at or near sea level and does not thrive at any altitude above about 1,500 feet. So far as the Colonial Empire is concerned coconuts are probably the most widely-grown of all Colonial products, and mention will be found of them in more than 30 of the memoranda in Part I of this volume.

Their importance, however, varies very greatly in different parts of the Colonial Empire.

In most parts of East Africa they are a product of minor importance only.

In Kenya European settlers have about 8,000 acres under coconuts and Indian settlers about the same and there are some areas in the Native Reserves, but production and exports are both inconsiderable.

* See page 555.

† See page 475.

‡ See page 154.

In Tanganyika Territory coconuts are grown mainly by natives, but there are some Indian and Arab plantations. The greater part of the produce (coconuts and copra) is used for food and in the local manufacture of soap, but exports of copra during recent years have been between 7,000 and 8,000 tons annually.

In Zanzibar, on the other hand, coconuts are a crop of major importance second only to cloves. About 55,000 acres in Zanzibar and Pemba are under coconuts and exports of fresh coconuts and copra in 1933 were valued at nearly £107,000, about 17 per cent. of all domestic exports.

In West Africa coconuts are only of minor importance. The coconut palm is common all along the Coast but there is little systematic cultivation. The Gold Coast exports copra to an amount of about 1,000 tons a year and there are also small exports from Nigeria. Coconuts are a foodstuff of secondary importance in Sierra Leone.

In the Eastern Dependencies the position is different.

In Ceylon coconuts are the most important of the Island's agricultural products apart from tea. About 1,100,000 acres (or approximately 15 per cent. of the total world-area under this palm) are under the coconut palm and exports of fresh coconuts and coconut products of all kinds including coir in 1933 were valued at over £2,100,000 or about 16 per cent. of all domestic exports. Some account of the industry will be found in the memorandum on Ceylon. One of the products, desiccated coconut, is a Ceylon speciality and is not elsewhere produced to any substantial extent.

Coconuts are a crop of major, but not outstanding, importance in most parts of Malaya and the Dependencies in Borneo, and copra and oil are an important item in the exports of most of these Dependencies.

In Mauritius itself coconuts are of minor importance but copra is practically the only export of the Dependencies of Mauritius.

In the Seychelles coconuts are the most important crop and copra represented about 45 per cent. of all domestic exports in 1933.

In several of the West Indies, as well as in British Guiana and British Honduras, coconuts are one of the principal minor products. Apart from the local consumption and export of fresh nuts there is also substantial production of copra. Until recently the whole of this was exported, but during the last few years local edible oil and soap factories have been erected in Jamaica, Trinidad, and British Guiana which absorb most of the local production.

In Fiji and the Western Pacific coconuts are a crop of major importance. In 1933, copra represented the proportion shown below of all domestic exports:—

	Percentage.
Fiji	19
Solomon Islands	82
Gilbert and Ellice Islands	24
Tonga	92
New Hebrides |... ..	33

Tables XVIII to XXI* show total exports of coconuts and coconut products (other than coir) in the Colonial Empire during the years 1930 to 1933.

It will be seen that the totals are as follows:—

	1930	1931	1932	1933
	£	£	£	£
Fresh coconuts	288,762	239,293	287,497	227,826
Desiccated coconut	752,695	512,423	536,261	505,997
Coconut cake	94,063	101,477	132,425	112,203
Copra	4,892,210	3,042,869	2,767,259	2,322,038
Coconut oil	1,282,123	1,110,836	1,331,109	1,102,964
Total	7,309,853	5,006,898	5,054,551	4,271,028

Eighth in order of importance by bulk, but higher in order of importance to the Colonial Empire, come the products of the oil palm.

A full account of the trade in oil palm products is contained in a publication of the Empire Marketing Board (Survey of Vegetable Oil-seeds and Oils, Volume I, Oil Palm Products, June, 1932).

The fruit of the palm has a soft pericarp and a hard nut containing kernels. The fruit is treated locally in the country of production; palm oil is extracted from the pericarp and the nut is cracked and the kernels extracted for export. The kernel is crushed in several European countries for the extraction of palm-kernel oil.

The home of the oil palm is West Africa and British West Africa is still the largest producer in the world. A great deal of the palm oil, however, is consumed locally as a foodstuff, as an illuminant and for various other purposes, and the relative importance of the British West African crop is shown better by the quantity of palm kernels produced in the various areas, since of these there is to all intents and purposes no local consumption.

In West Africa a small plantation industry has recently been established but the great bulk of the palms are still grown under wild conditions. Oil-palm plantations have also been established within recent years in Malaya and the Netherlands East Indies and supplies both of oil and of kernels from these areas and from the Belgian Congo are steadily increasing.

It is estimated by Messrs. Frank Fehr and Company that the quantity of these commodities which reached the world markets in 1934 was about 340,000 tons of palm oil, of which 140,000 tons came from British West Africa, and that about 505,000 tons of palm kernels were produced, of which 500,000 tons yielding (on a basis of 45 per cent.) 225,000 tons of palm-kernel oil were available for crushing. Of this quantity about 325,000 tons, equivalent to 147,000 tons of oil came from British West Africa.

* See pages 551 and 553.

Although both oils fall in the main interchangeable group, palm oil is used principally for the manufacture of soap and candles and to a small extent for margarine and as a flux for tin plating, while palm-kernel oil is used principally for the manufacture of margarine and soap.

Total exports of palm oil and palm kernels from the Colonial Empire in the years 1930 to 1933 are shown in Tables XXIV* and XXV†. It will be seen that although the volume of exports has remained steady, the value has declined by nearly 50 per cent.

Other oil-seeds are relatively of less importance. The largest supplies are those of **rape-seed**, the seed of a plant of the turnip family which is grown as an annual crop. The estimated world crop for 1934 is 1,200,000 tons, which is very much the same as the average for the five preceding years. Of this about a million tons are produced in India and the remainder mostly in China, Poland and Roumania; there is no Colonial production. It is estimated that 800,000 tons were available for crushing, yielding, on a basis of 35 per cent. of oil, about 280,000 tons of oil.

The most important minor oil-seed from the point of view of the Colonial Empire is **sesame-seed**, also known as *benniseed* in West Africa and *gingelly* in Ceylon. World production of this seed in 1934 was estimated at about 585,000 tons, of which 500,000 tons were produced in India and most of the rest in China. Exports of this and other minor oil-seeds from the Colonial Empire in the years 1930 to 1933 will be found in Table XXVI‡. There is production in Kenya, Uganda, Tanganyika Territory, Zanzibar, Nigeria, Sierra Leone, Ceylon, and Palestine. The chief source of supply for the export markets is India.

Shea-nuts and the fat derived therefrom, known commercially as **shea butter**, are produced in Nigeria and the Gold Coast, the shea-butter tree being a native of the dry parts of those Dependencies.

Illipe-nuts, which yield a rather high-class fat used for much the same purposes as cocoa butter, are produced in Malaya and the Dependencies in Borneo.

There is a small production of tung fruits, the source of **tung oil**, from experimental plantings in certain Dependencies in Africa and in the New Hebrides, but it is not yet established that this commodity can be satisfactorily produced in the Colonial Empire.

Castor oil is another of the minor oils used for very specialized purposes as a lubricant and for medicinal purposes. Its cake is valueless for stock-feeding purposes but is used as a manure. There is no commercial production of the castor-seed in the Colonial Empire, except to a small extent in the New Hebrides, but experiments in its production have been made and are being continued in a number of Dependencies.

It has been said above that certain animal products compete with the vegetable oils. Of these the most important are **whale oil**, of which some account will be found under the heading of Marine Products,§ and **lard** and **tallow** of which there is practically no production in the Colonial Empire.

The following table, adapted from Messrs. Frank Fehr and Company's Annual Report for 1934, summarizes the total production of vegetable and animal oils and fats during the year 1934. Certain of the figures are admittedly subject to a wide margin of error, but they serve to give some indication of the relative importance of the various oils and fats and can be used as a basis of comparison for assessing the importance of Colonial production.

The various products have been arranged in order of total quantities. It will be observed that owing to the variations in oil content the order is not identical with that in which the oil-seeds have been arranged above:—

	<i>Tons.</i>
Cotton-seed oil	1,100,000
Groundnut oil	1,100,000
Coconut oil	1,000,000
Linseed oil	840,000
Olive oil	650,000
Soya-bean oil	638,000
Lard	600,000
Whale oil	410,000
Sunflower-seed oil	375,000
Palm oil	340,000
Tallow	280,000
Rape-seed oil	280,000
Palm-kernel oil	225,000
Sesame-seed oil	221,000
Other oils	272,000
	8,331,000

or roughly 8½ million tons of oils and fats.

Of these by far the greatest part is used for the manufacture of soap and margarine, and it is on the relation between world supplies and the demand for these two products that the price of most individual oil-seeds depends. As pointed out above the wide measure of interchangeability between the various oils causes the fluctuation of supplies of individual commodities to have little effect on the price of those commodities. The producer is therefore deprived of the compensation which is open to most producers of primary products, that if there is a partial crop failure what can be reaped fetches an enhanced price.

In recent years there has been definite evidence that supplies of these oils, as a whole, have exceeded the demand for them at prices comparable to those prevailing a few years ago. This is partly due to the general trade depression but is also due to changes in the demand for the products manufactured from these oils.

The demand for soap seems to have withstood the general trade depression pretty well, and if this were the only use there might be no cause for apprehension regarding the future of the oil products.

* See page 555.

† See page 556.

‡ See page 556.

§ See page 489.

But the position of margarine is very different. One of the developments of recent years has been a great increase in the production of dairy products in most of the countries which have hitherto been net importers of both butter and margarine. This coincided with a large increase of butter production in the principal exporting countries, and the consequence has been that the price of butter particularly in the United Kingdom, has dropped to a figure at which there is very little margin between the prices of the lower grades of butter and those of the higher grades of margarine and there has therefore been a definite shrinkage in the demand for the latter; while in some countries the trade in margarine is prevented from expanding by legislative control.

Statistics collected by the Empire Marketing Board indicate that in the principal producing countries (Germany, the United Kingdom, the United States of America, Holland, Belgium, and the Scandinavian countries) margarine production, which averaged 1,120,000 tons in the years 1927 to 1929 and increased to 1,150,000 tons in 1930, dropped to 1,050,000 tons in 1931, and 1,000,000 tons in 1932. Owing mainly to the greatly reduced German output, the estimate for 1933 dropped to 880,000 tons.

Unfortunately there has been no corresponding decrease in supplies, indeed of certain commodities there has been a tendency to increase, and the inevitable result has been that prices have now dropped to figures hitherto unknown. Equally unfortunately for Colonial producers, although the production of oil-seeds and nuts and vegetable fixed oils in the Colonial Empire is small compared to the total world production, yet it is very much in excess of the requirements of the United Kingdom, the only really substantial Empire importer, and this has deprived the preference granted to Empire producers in the United Kingdom market of much of its value. It seems probable that at the present level exports from certain areas must have become unprofitable, and, if so, exports from those areas are likely to diminish or even cease. There was some alleviation of the position in the winter 1934-35. Owing to the general drought throughout the northern hemisphere there was a great shortage of feeding-stuffs and fats during this period, and consequently a substantial rise in the price of all oil-seeds and nuts. A peak was reached during the spring but by the middle of the year it appeared that a new decline had begun.

It is quite impossible to frame any estimate of the value of the total Colonial production of the oil-seeds and nuts and vegetable fatty oils. Some observations have, however, been made above on the value of total Colonial exports of the principal members of the group. The figures may be summarized as follows:—

	1930.	1931.	1932.	1933.
	£	£	£	£
Copra	4,892,210	3,042,869	2,767,259	2,322,038
Groundnuts	3,321,850	2,054,993	2,465,467	2,739,507
Other coconut products	2,417,643	1,964,029	2,287,292	1,948,990
Palm oil and palm kernels	7,876,211	4,328,009	5,154,707	3,982,574
Other oil-seeds, nuts, and oils	671,864	350,217	479,799	542,739
Total	19,209,797	11,870,051	13,138,846	11,535,848

RICE.

Varieties, Methods of Cultivation, etc.

The rice plant (*Oryza sativa*) is an annual grass bearing panicles of grain, each grain being enclosed in a separate husk. The original wild plant is supposed to be a native of the warmer parts of Asia, and from it has been derived a large number of cultivated varieties, the majority adapted for lowland and marshy lands, and others, known as upland or hill rice, for growth on dry land.

Of all the grain crops rice supplies food for the greatest number of the world population. By far the greater part of the enormous crop is grown in level stretches of land, which are submerged in water by the rainfall or by means of irrigation. Such crops may be broadcasted or raised from seedlings grown in nurseries and transplanted subsequently into the fields. Upland or hill rice, however, is sown broadcast on ordinary arable land and depends on rainfall for its growth.

The rice in the husk (*paddy* or *padi*) is threshed when ripe, and before consumption must be hulled, so that the husk may be removed. This process is performed on a small scale by pounding with a pestle and mortar, but is now more generally performed by machinery in a mill, and in most cases the rice, after the husk has been removed, is polished. The polishing, though it improves the appearance of the rice and is said to preserve it from deterioration, is actually harmful as it removes the bran and the germ and so renders the consumer where rice is the main article of diet liable to *beri-beri*, unless the food deficiency is made up in some other way.

A rice-mill produces besides the finished whole rice a quantity of "broken rice" which is used chiefly for brewing, distilling, and the manufacture of starch, and "rice bran" which is used for cattle food.

In certain areas (chiefly in British Guiana and Ceylon, so far as the Colonial Empire is concerned) the paddy is parboiled and then dried in the sun before the husk is removed.

World Production and Consumption.

It is not possible to estimate the total world acreage under rice, since the area in China, the largest producer, cannot be estimated even approximately.

In India, the next largest producer, on an average about 80 million acres are put under rice annually, but the difference between the maximum and minimum acreage during the last seven years has been as much as 5 million acres. There is no important area under rice in the

Dominions but certain areas are utilized for rice growing under irrigation in some parts of Australia. In the Colonial Empire the area may be estimated very roughly at 2 million acres with a rising tendency. In foreign countries other than China the area fluctuates between about 52½ and 53½ million acres annually.

It is not possible to estimate the annual world production of rice more than very approximately since to all intents and purposes the whole of the rice crop in China and a very large proportion, if not the whole, of the crop in some other producing countries is consumed within the country of production.

As a very rough estimate it can be taken that the production of China is in the region of 50 million tons annually as a minimum, and that of the rest of the world between 85 and 90 million tons annually, of which India contributes between 45 and 50 million tons. The minimum world production can therefore be taken at about 135 million tons.

World exports, however, only amount on an average to about 6½ million tons annually, of which India supplies on an average about 2½ million tons, Indo-China rather more than 1½ million tons, and Siam rather less than 1½ million tons.

The principal importing countries are Japan, which takes from 1,150,000 to 1,850,000 tons annually, China which takes from about 650,000 to 1,250,000 tons, Malaya which takes from 700,000 to 800,000 tons, the Netherlands East Indies which take from 450,000 to 750,000 tons, Ceylon which takes about 500,000 tons, Germany, France and Holland which between them take from 700,000 to 900,000 tons and the United Kingdom which takes about 120,000 tons.

There is, of course, this distinction between the Eastern and the European consuming countries that, whereas in the former rice is the staple foodstuff and a shortage in the domestic crop must be made good by imports if famine is to be avoided, in the latter it is merely an alternative foodstuff which can be replaced by other products if prices are high or supplies short.

The price of rice in the export markets is therefore a world price, which is determined principally by the out-turn of the crops in the great producing countries in the East, and particularly in the three big exporting countries India, Indo-China, and Siam. If all the crops are large, there is generally an unwanted surplus which drives the price down and may perhaps result in smaller plantings in India in the following season. On the other hand, if there are widespread crop failures the price may go above the purchasing capacity of China and there may be widespread famine.

Fluctuations of supply in producing countries other than Eastern, and in the demands of Europe, are relatively so small that they have little effect on the price.

An added complication exists in the fact that there is constant fluctuation in the exchange value in terms of gold of the currencies of China, which are on a silver basis, and also, during recent years, in the exchanges between the gold countries (Indo-China and the big Continental consumers) the sterling group (the United Kingdom, India, the Colonial Empire, and Siam) and Japan.

Colonial Production.

The production of the Colonial Empire cannot be estimated accurately but is probably in the region of a million tons a year with an increasing tendency.

In some of the Eastern Dependencies, for instance the Straits Settlements, Hong Kong, Sarawak, and North Borneo, production is probably not far short of capacity; there is still a little room for increase in Ceylon, and probably room for a substantial increase in the Federated and Unfederated Malay States; but all these territories, except Sarawak and North Borneo, are importers on a large scale. In Africa the merits of rice as a staple foodstuff are being recognized to an increasing degree and the cultivation is increasing.

In Sierra Leone rice is the most important crop, and the staple food of the people. It is estimated that the annual production is very approximately 200,000 tons of cleaned rice; local requirements are now fully satisfied, and there is occasionally a small surplus for export.

In parts of Tanganyika Territory rice is a staple foodstuff; over 150,000 acres are now under rice, all local requirements are met and in 1933 net exports rose to nearly 6,300 tons valued at about £62,000.

In East Africa, outside Tanganyika Territory, the only production is in Uganda and Zanzibar and in both places is unimportant.

So far as West Africa, other than Sierra Leone, is concerned, there is substantial production in certain parts of Nigeria, and a very large expansion would be possible, but there is still a net import of about 8,000 tons annually. In the Gold Coast production is being encouraged in the Axim District and may well expand. In the Gambia rice is cultivated for local consumption.

Other Colonies in which rice is an important crop are Fiji, where about 10,000 tons are produced annually, and British Guiana.

British Guiana is the only Dependency other than Tanganyika Territory from which there are important exports of rice. In that Colony rice is the second most important export crop, but it is much less important than sugar, the principal export, and the exports for 1933, 29,120 tons valued at over £220,000, only represented about 12 per cent. of the total domestic exports.

RUBBER.

Varieties, methods of production, etc.

Rubber is the coagulated latex of certain trees and plants and its principal constituent, which gives it its special characteristics, is known as caoutchouc. In 1933 exports of rubber from the Colonial Empire were greater in value than those of any other single commodity.

While numerous varieties of trees and plants belonging to different botanical species contain rubber latex, one, *Hevea brasiliensis*, is of outstanding importance and the rubber produced from it, sometimes known as *Para rubber*, contains over 90 per cent. of caoutchouc of excellent quality and is the ordinary rubber of commerce.

Certain tropical African trees notably *Funtumia elastica* and various species of *Landolphia* yield rubber of good quality. Other trees, for example the *Ficus elastica* of India and Burma, *Castilloa elastica* of Central America and *Manihot Glaziovii*, which is a native of the Province of Ceara in Brazil, yield rubbers of varying quality. Rubber is also obtainable by mechanical processes (not tapping) from a number of shrubs. Of these the three most important are *guayule*, which is indigenous to northern Mexico and neighbouring parts of the United States of America, and *tau sagiz* and *kök sagiz*, which occur wild in Russia, and are also being planted in considerable areas of that country. Synthetic rubber can also be made but at high cost.

The *Hevea brasiliensis* is a native of Brazil, and for many years the main source of commercial supplies of rubber was the wild trees in the Amazon valley.

When rubber first became a commercial product in the first half of the nineteenth century, supplies only amounted to about two or three thousand tons a year; the first commercial use of the substance was as an eraser, hence the name "rubber."

As its qualities became known, it was gradually taken into use for other industrial purposes, such as the manufacture of waterproof fabrics, soles for footwear, balls of various kinds, and bicycle and vehicle tyres. The process has continued ever since, and new uses for rubber are still being found; but it was the first beginnings of the motor industry, at the end of the nineteenth century, that by creating a large new demand for rubber which was obviously going to expand first gave an occasion for the large scale cultivation of rubber as a plantation crop. In 1900 the world production of rubber was about 55,000 tons of which all except about five tons was wild rubber collected from virgin forest areas in South and Central America, Africa, etc. By 1905 the world output had reached 62,145 tons, of which 4,172 tons were produced in the British Empire, chiefly in West Africa and 145 tons were plantation rubber. By 1910, over a million acres had been planted in Malaya, Ceylon and the Netherlands East Indies. Most of this was however still immature. In that year total production was about 77,000 tons, of which the Empire share was 11,217 tons, including 8,406 tons of plantation rubber.

In 1913 total supplies were about 115,000 tons, of which 48,187 tons were of Empire origin, including 46,919 tons of plantation rubber. The estimate of world production in 1934 is 1,016,784 tons of which nearly 600,000 tons was produced in the Empire, and only 13,800 tons, nearly all foreign, was wild rubber.

Although the plantation industry is the product of the present century only, the first attempts to grow *Hevea* as a cultivated tree in other areas besides its original home date back to 1876.

In that year seeds were first collected on behalf of the Royal Botanical Gardens and attempts were made to establish the seedlings grown from them at Kew, first in India, but without success, and then successfully in Ceylon and Singapore. Later further plants were transferred from Ceylon to Malaya and thence to the Netherlands East Indies and other foreign countries. Trials with the cultivation of *Castilloa*, *Ceara*, *Funtumia*, and other rubber-producing trees have been made in various parts of the world, but it is only the cultivation of *Hevea* that has given satisfactory results.

The *Hevea* is a large tree which on plantations usually attains a height of 60 to 80 feet. It is usually grown about 70 to 100 to the acre on European estates but more closely on native holdings. It requires a moist and equable climate without high winds and with a well-distributed rainfall of not less than 80 inches a year and an average temperature of 70-80° F. It flourishes up to an elevation of 2,000 feet in Ceylon, but does best at or near sea level, provided that marshes and swamps are avoided.

The conditions stated above obviously limit the areas in which it can profitably be grown.

No estimate is now possible of the acreage under wild rubber in South America and other parts of the world but in view of the negligible part which wild rubber now plays in the world market the point is one of academic interest only.

The following table shows the latest estimate of the approximate world acreage under plantation rubber on the 31st of December, 1933:—

Country.	Mature. Acres.	Area Immature. Acres.	Total. Acres.
Empire			
Malaya:—			
Straits Settlements	328,000	10,000	338,000
Federated Malay States	1,404,000	119,000	1,523,000
Unfederated Malay States	1,024,000	249,000	1,273,000
<i>Total Malaya</i>	<u>2,756,000</u>	<u>378,000</u>	<u>3,134,000</u>
Ceylon	585,000	20,000	605,000
India (including Burma)	200,000	37,000	237,000
Dependencies in Borneo:—			
North Borneo	115,000	30,000	145,000
Sarawak	215,000	50,000	265,000
Brunei and Labuan	10,000	2,000	12,000
<i>Total Dependencies in Borneo</i>	<u>340,000</u>	<u>82,000</u>	<u>422,000</u>
Other	30,000	—	30,000
<i>Total Empire</i>	<u>3,911,000</u>	<u>517,000</u>	<u>4,428,000</u>

Country.	Area		
	Mature Acres.	Immature Acres.	Total Acres.
Foreign Countries			
Netherlands East Indies* :—			
Java	480,000	93,000	573,000
The rest	2,322,000	372,000	2,694,000
<i>Total Netherlands East Indies</i> ...	2,802,000	465,000	3,267,000
French Indo-China	208,000	101,000	309,000
Siam	130,000	30,000	160,000
Other foreign countries	44,000	40,000	84,000
<i>Total Foreign Countries</i>	3,184,000	636,000	3,820,000
GRAND TOTAL	7,095,000	1,153,000	8,248,000

(The division of "other countries" between Empire and foreign is necessarily somewhat conjectural as also are the figures for native rubber in the Netherlands East Indies and Siam.)

It would be going beyond the scope of this memorandum to give any elaborate account of the cultivation and management of rubber estates but a brief account of the processes employed in preparing rubber for the market is necessary to render comprehensible the various trade terms employed.

The latex is obtained by "tapping," that is making an incision in the bark of the stem of the tree, cutting away a thin shaving, and collecting the latex, as it flows, in a small cup. Considerable study has been devoted to the technique of tapping, and the practice regarding the shape of the incision and the frequency of tapping varies on different estates.

In most areas the tree is ready for tapping when about five years old, though some variations occur, but quantity and quality of latex do not rise to their maximum until some years later. On most well-organized estates regular tapping is not commenced until the sixth year. It is not yet certain what the maximum life of the rubber tree under plantation conditions is; some trees have been tapped for over thirty years but as time goes on it becomes increasingly difficult to find suitable bark, since the tapping involves the removal of a panel of bark and its even renewal becomes more difficult each time that it is removed.

The actual yield of trees varies widely, but the following table shows what is regarded by the best authorities as the good average yield in pounds of dry rubber per acre per annum of plantations in favourable circumstances:—

Year.	lb.	Year.	lb.
5th	180	8th	350
6th	250	9th	400
7th	300	10th and following	450

The whole practice of the industry has, however, recently been revolutionized by adopting the practice of bud-grafting as a method of propagation. It is estimated that in bud-grafted areas a yield of 1,000 to 1,200 lb. of dry rubber per acre per annum can be attained.

The following table shows the Rubber Growers' Association's estimate of areas under bud-grafted rubber on the 31st of December, 1933.

	Total Area. Acres.	Bud-grafted area.		Total Acres.
		Mature. Acres.	Immature Acres.	
Malaya	3,134,000	29,145	142,582	171,727
Netherlands East Indies (1931)	3,267,000	?	?	353,000
French Indo-China	309,000	?	?	87,000
Other	1,538,000		unknown.	
	8,248,000			

The method of preparation of latex for the market varies according to the nature of the commodity which it is desired to produce. The first stage is to collect the latex in pails, transport it to the factory, strain it, and bulk it in tanks.

Usually the first step is to coagulate it and in this event the latex is run into shallow tanks and a small quantity of acetic, formic, or other acid is added to the mixture. The wet rubber so coagulated is then squeezed between rollers into strips.

The rubber in this stage can be converted either into sheet or into crêpe. Sheet is either air dried or smoked, the latter being the more usual process. In this event after being hung out to dry for a little it is placed in a smoke-house and smoked for a period which may be as little as five days or as much as fifteen but is usually about ten. No elaborate machinery is required for the preparation of **smoked sheet**.

In the preparation of **crêpe** rubber the wet rubber is passed through heavy power driven machinery and then dried, either naturally in the air in sheds, or artificially in hot air or vacuum driers.

* Figures for June 1934.

For certain purposes now the latex is not coagulated at all but is bulked for export as a liquid, either in its natural state or after a certain amount of concentration. Ordinary latex contains on the average about 35 per cent. of rubber by weight. A normal degree of concentration of latex for shipment is about 60 per cent. of rubber. With further concentration the latex tends to become a paste, as in the case of revertex, a special product containing 70 to 75 per cent. of rubber.

The area under plantation rubber is set out in the table above, but not all the mature area is being tapped at the present time. No complete statistics are available, but it is estimated that at the end of November, 1934, the following areas were out of tapping.

(a) Malaya, on estates of 100 acres and upwards:—237,000 acres or 15.1 per cent. of the tappable area at the end of 1933.

(b) Netherlands East Indies, on estates of 100 acres and upwards:—213,000 acres or 17.4 per cent. of the tappable area.

(c) Malaya, on smallholdings (30th September, 1934) 8 per cent. of the tappable area in the Federated Malay States and 11 per cent. in the Straits Settlements.

World production and consumption.

The early history of rubber production has been given above. The growth of the motor industry was responsible for the rapid expansion of the areas of planted rubber, but owing to the period of five or six years required for rubber trees to reach maturity, production failed to keep pace with the growing demand for rubber, and in 1910 prices rose as high as 12s. 9d. per lb.

These high prices stimulated further planting, and by 1920 the area under "plantation" rubber had reached more than 4 million acres, with the result that now production far exceeded demand, and the price of rubber fell as low as 7½d. per lb. in June, 1921.

The low prices ruling in 1920 and 1921 led to the introduction of the "Stevenson Rubber Restriction Scheme", which came into force on the 1st November, 1922. Under this scheme, which applied to Ceylon, the Malay States and the Straits Settlements, rubber exports were restricted by a graduated scale of export duties which varied automatically according to the price of rubber. A fixed percentage of standard production could be exported at the minimum rate of duty: this percentage was reduced if the price of rubber fell below 1s. 3d. per lb., and increased if the price rose above that level. An advisory committee in London co-ordinated the working of the scheme in the different colonies, and advised the Secretary of State for the Colonies as to alterations in the rate of minimum duty under the scheme.

The Stevenson scheme was open to several severe disadvantages. In the first place, it applied only to British rubber producers. As a result, Dutch producers in the Netherlands East Indies were free to increase their production at the expense of the British producers, who were submitting to restriction. In the second place, the scheme was too rigid and export quotas could not be varied sufficiently rapidly to prevent prices soaring. This rendered the scheme particularly repugnant to the United States of America who, as the principal consumers, considered they were being unfairly treated by a monopoly designed in their opinion to exploit the consumers in favour of the producers.

For these and other reasons His Majesty's Government decided to terminate the scheme on the 1st November, 1928.

In 1929, largely increased supplies of rubber were available, but although no restriction at all was in force, the price was maintained at a reasonable level owing to the marked expansion of demand, particularly in the United States of America. During 1930 and 1931, however, the world economic crisis produced an enormous reduction in demand, and the price of rubber fell as low as 1½d. per lb. in June, 1932. The uneconomic prices naturally revived the question of control of output, and after protracted negotiations an Agreement embodying a regulation scheme embracing this time all the more important rubber producing territories in the world was successfully concluded. On the 7th May, 1934, the Governments of the United Kingdom (on behalf of Ceylon, the Federated Malay States, the Unfederated Malay States, the Straits Settlements, the State of North Borneo, Brunei and Sarawak), France (for French Indo-China), India (for India and Burma), the Netherlands (for the Netherlands Indies), signed the Agreement. The Government of Siam signed also subject to ratification by the People's Assembly, which has now been given.

The main objects of the scheme are "to regulate the production and export of rubber in and from the producing countries with the object of reducing existing world stocks to a normal figure and adjusting in an orderly manner supply to demand and maintaining a fair and equitable price level which will be reasonably remunerative to efficient producers". The Agreement came into force on the 1st June, 1934, and will continue till the end of 1938. The International Rubber Regulation Committee mentioned below has the duty of making a recommendation to the contracting Governments not less than nine months before the end of 1938 as to the continuation or otherwise of the scheme; the recommendation can be accepted or rejected by the contracting Governments, and any Government which is unwilling to continue in a scheme of regulation is released from any obligations under the present scheme from the end of 1938.

Each signatory producing country is allotted an annual basic quota as follows:—

	1934.	1935.	1936.	1937.	1938.
	<i>Tons.</i>	<i>Tons.</i>	<i>Tons.</i>	<i>Tons.</i>	<i>Tons.</i>
Straits Settlements, Federated Malay States, Unfederated Malay States and Brunei.	$\frac{7}{8}$ of 504,000	538,000	569,000	589,000	602,000
Netherlands Indies	$\frac{7}{8}$ of 352,000	400,000	443,000	467,000	485,000
Ceylon	$\frac{7}{8}$ of 77,500	79,000	80,000	81,000	82,500
India	$\frac{7}{8}$ of 6,850	8,250	9,000	9,000	9,250
Burma	$\frac{7}{8}$ of 5,150	6,750	8,000	9,000	9,250
State of North Borneo ...	$\frac{7}{8}$ of 12,000	13,000	14,000	15,500	16,500
Sarawak	$\frac{7}{8}$ of 24,000	28,000	30,000	31,500	32,000
Siam	$\frac{7}{8}$ of 15,000	40,000	40,000	40,000	40,000

The percentage of these basic quotas which may be exported is fixed from time to time by the International Rubber Regulation Committee, the body set up to run the scheme. In the case of Siam, these percentages were to be not less than 50 per cent. for 1934, 75 per cent. for 1935, 85 per cent. for 1936, 90 per cent. for 1937, and 100 per cent. for 1938. Special provision is made for French Indo-China, whose quota varies round 30,000 tons.

The International Rubber Regulation Committee is composed as follows:—

Members.

Straits Settlements, Federated Malay States, Unfederated					
Malay States, Brunei	...	...	...	...	4
Netherlands Indies	...	...	...	...	3
Ceylon	...	...	...	...	2
India, including Burma	...	...	...	...	1
French Indo-China	...	...	...	...	1
State of North Borneo	...	...	...	...	1
Sarawak	...	...	...	...	1
Siam	...	...	...	...	1

Each delegation possesses a number of votes on the basis of one vote for every complete 1,000 tons of its basic quota for the time being.

There is also a clause under which three leading manufacturers, one of whom represents American rubber manufacturers, have been nominated to advise the Committee on matters affecting consumers' interests.

In addition to regulating periodically at such intervals as may seem desirable the percentage of the annual quota which may be exported during any given period of a year, the Committee has the duty of supervising the general working of the scheme, and seeing that its provisions are duly carried out.

Apart from the regulation of exports the main provisions under the scheme are:—

(1) The prohibition of new planting, and the limitation of the amount of re-planting permitted.

(2) The prohibition of the exportation of rubber seed or any part of the rubber plant which might be used for propagation.

(3) The control of the amount of stocks that may be held within signatory producing countries (Singapore and Penang are considered as being outside the regulated areas).

(4) The control of imports and exports by means of certificates of origin.

The scheme also contemplates the possibility of forming an International Rubber Research Board to plan schemes for research and propaganda with funds provided by a uniform cess levied on the net exports of the producing signatory countries other than Sarawak and Siam.

It will be seen that the present scheme differs in many important respects from the Stevenson scheme.

In the first place, it covers almost the entire producing area of the world, and has the consent of all the Governments involved. It must not, however, be forgotten that the areas outside the scheme, even if negligible at the moment, have a considerable potential production, especially the wild rubber areas in the Amazon Valley and Africa, and the Firestone plantations in Liberia, while the use of reclaimed and synthetic rubbers and substitutes may also assume considerable proportions if the price of crude rubber is very high.

In the second place, the scheme does not aim at attaining any fixed price for rubber; its ultimate objective is that efficient producers should obtain a reasonably remunerative price for their product, and that this price should be as stable as possible. But no machinery for fixing or holding any particular price exists under the scheme. The objective is to be attained simply by adjusting supply to demand and by liquidating the excessive stocks which overhang the market.

Thirdly, in the role of the International Rubber Regulation Committee there is an important difference between the Stevenson and the present scheme. Under the Stevenson scheme the Advisory Committee advised the Secretary of State for the Colonies as to alterations of duties, etc.; this proved a somewhat cumbersome procedure and involved considerable delay. Under the present scheme, the members of the Committee are plenipotentiaries and are able to vary export quotas at a moment's notice; this should be an important factor in smoothing out excessive price movements.

The Agreement carries out the spirit of the resolution passed by the production and marketing sub-commission of the World Economic Conference, that regulation schemes should "be fair to all parties, both producers and consumers, should be designed to secure and maintain a remunerative price level, should not aim at discriminating against a particular country, and should as far as possible be worked with the willing co-operation of consuming interests in importing countries, who are equally concerned with producers in the maintenance of regular supplies at fair and stable prices".

The following table shows the consumption of rubber in various countries during recent years:—

World Consumption of Crude Rubber.

(Thousands of Tons.)

	1929.	1930.	1931.	1932.	1933.	1934.
United States of America ...	470	378	349	332	406	456
United Kingdom ...	72	75	77	78	80	110
Japan ...	34	33	44	56	67	72
Germany ...	49	46	39	45	54	59
France ...	62	71	48	42	63	50
U.S.S.R. ...	13	17	31	30	31	47
Canada ...	36	29	25	21	19	28
Other Countries ...	72	65	64	81	94	105
Total ...	808	714	677	685	814	927

In view of the vast preponderance of the United States of America as a consuming country, it was definitely laid down in the agreement that one member of the panel representing consumers' interests should be a representative of American rubber manufacturers. Accordingly, the Rubber Manufacturers' Association of New York were asked to nominate a member; while the other two members were appointed by the Indian Rubber Manufacturers' Association of Great Britain and the Reichsverband der Deutschen Kautschukindustrie of Berlin respectively. The formation of this panel, which attends meetings of the Regulation Committee when matters affecting consumers' interests are being discussed, is a provision not paralleled in any other regulation scheme up to the present.

The Regulation Committee fixed the percentage of the basic quotas which it was permissible to export during 1934 at 100 per cent. for June and July, 90 per cent. for August and September, 80 per cent. for October and November, and 70 per cent. for December.

This very moderate reduction, amounting over the whole remaining seven months of 1934 to a cut of about 13 per cent., gave time for the signatory producing countries to arrange and adjust the necessary machinery for working the scheme before any appreciable measure of restriction was introduced.

For 1935 the percentage of restriction was fixed at 25 per cent. for the first quarter, 30 per cent. for the second quarter and 35 per cent. for the remainder of the year.

From June, 1932 to June, 1933, prices remained below 3d. per lb. then a gradual improvement took place due in part to increasing consumption but mainly to rumours of the probable introduction of a new scheme of regulation, and prices rose to 4d. at the end of 1933, and to 6d. by the end of April, 1934, when the introduction of regulation was accepted as certain. Since the introduction of the scheme the price has varied between 5½d. and 7½d. with an average for the whole period of about 6½d.

Full statistics of rubber production, consumption, stocks, etc., are published by the International Rubber Regulation Committee in a monthly bulletin, copies of which may be obtained from Messrs. W. H. Smith and Son, Limited, price 1s. a copy.

The following table gives the export of rubber in 1925 and the last five years from (a) countries now parties to the regulation scheme, (b) other countries.

(a)

Year.	Malaya including Brunei and Labuan.*	Ceylon.†	India and Burma.‡	North Borneo.	Sarawak	Netherlands East Indies.	Siam.‡	French Indo-China.	Total.
1925 ...	210,000	45,700	11,000	5,400	9,100	189,000	4,600	7,400	482,200
1930 ...	443,000	75,600	12,000	7,100	10,600	241,000	4,700	9,700	803,700
1931 ...	423,000	62,300	9,600	6,200	10,400	257,000	3,600	11,000	783,100
1932 ...	406,000	49,300	4,100	5,400	7,100	211,000	3,000	13,500	699,400
1933 ...	445,800	63,800	4,600	7,800	11,100	280,800	7,000	15,900	837,100
1934 ...	467,030	79,068	11,454	11,086	17,708	379,401	17,714	19,628	1,003,089

* Ocean Shipments less foreign imports other than from Brunei.

† Exports of domestic produce.

‡ Imports into Malaya from Siam.

(b)

Year.	Philippines and Oceania.	Africa.	South America.	Mexican Guayule.	Total.
1925	700	7,800	30,200	4,000	42,700
1930	1,200	4,900	14,300	1,000	21,400
1931	900	3,500	12,200	—	16,600
1932	800	2,100	6,500	—	9,400
1933	1,100	2,000	10,100	—	13,200
1934	1,233	2,921	9,143	398	13,695

The figures of absorption of crude rubber have been given above. Consumption of reclaimed rubber in the United States of America has been :—

Year.	Tons.	Year.	Tons.
1925	137,000	1930	153,500
1926	164,500	1931	123,000
1927	189,500	1932	77,500
1928	223,000	1933	85,000
1929	217,000	1934	100,855

Figures for other countries are not available.

Estimated world stocks of crude rubber on the last day of each year have been as follows :—

Year.	Tons.	Year.	Tons.
1925	153,000	1930	456,000
1926	232,000	1931	592,000
1927	264,000	1932	593,000
1928	249,000	1933	619,000
1929	331,000	1934	684,000

Colonial Production.

So far as the Colonial Empire is concerned, rubber is the principal domestic export of most of the Dependencies in Malaya. In the Federated Malay States in 1933 domestic exports were valued at £6,718,007 or about 53 per cent. of all domestic exports. In the Straits Settlements rubber is the most important primary product, but for the reasons stated in the memorandum* on that Colony in Part I, it is difficult to assess its exact relation to other domestic products.

In Johore rubber represented about 63 per cent., in Kedah about 70 per cent., in Kelantan about 55 per cent., and in Trengganu a little under 13 per cent. of all domestic exports.

In the Dependencies in Borneo rubber is of less importance and in 1933 represented less than 16 per cent. of all domestic exports. In Ceylon it represented about 13 per cent. of all domestic exports.

Elsewhere in the Colonial Empire rubber is a product of minor importance only. The rise in price during 1933 brought about a resumption of exports on a small scale from Kenya and Uganda and Nyasaland, and there was an increase in exports from the Gold Coast and Nigeria. Exports from Tanganyika Territory, British Guiana, Trinidad and Fiji remained either nil or negligible.

Table XXVIII† shows all exports of rubber from the Colonial Empire in the years 1930 to 1933. The final figures showing assumed domestic exports, that is total exports less imports, are necessarily an approximation, since there is a large *entrepôt* trade in rubber in the Straits Settlements and it is difficult to obtain an actual figure for the domestic exports of Malaya. The figures of quantity are actual exports less actual imports; the figures of value are calculated on the assumption that the average value per ton of domestic exports of rubber from Malaya was the same as the average value of total exports.

The value of all domestic exports of rubber from the Colonial Empire was about £45 million in 1929, £27 million in 1930, £13 million in 1931 and under £9 million in 1932, a greater proportional drop than that experienced in the case of any other Colonial product of major importance. The value rose again in 1933 to about £13 million and to a considerably higher figure in 1934.

SPICES AND CONDIMENTS.

Under the name "spices" are included certain aromatic or pungent vegetable products of such diverse origin as fruit seeds, flower buds, bark and underground stems or rhizomes, and there is some doubt whether certain products should be included under this head or not. For instance, areca nuts (betel nuts) are sometimes classed as spices and sometimes not; in the present volume they have been included under the head of "Miscellaneous". Spices are for the most part grown within the tropics, and some varieties are grown almost exclusively in certain limited areas.

Most spices are used as food flavourings, either in their crude state or after grinding. In some cases they are used, either additionally or exclusively, for the manufacture of flavouring essences. Spices and flavouring essences are also put to other uses besides food flavouring, for instance medicinally.

"Condiments" is a convenient term to apply to a small group of products, which are not usually classed as spices but are used as food flavourings and "curry stuffs".

* See page 175.

† See page 558.

Nearly all spices are produced in the Colonial Empire, but the production in some cases is very small. Exports during the years 1930 to 1933 are set out in Table XXIX.* As no individual spice is of outstanding importance, they can most conveniently be arranged in alphabetical order.

Cardamoms are the fruit of the *Elettaria Cardamomum*. Some account of this spice will be found in Section V.A. 1† of the memorandum on Ceylon. It is a powerful aromatic and is used as an ingredient in curry powder, for flavouring cakes, Bologna sausages, liqueurs, etc., and, in medicine, as a deadener of tastes.

The principal sources of supply are India and Ceylon, the area under this crop in the latter being about 6,000 acres. There is a small production in Malaya (where 44 acres are under this crop) and in Tanganyika Territory.

No estimate of total production is available.

Exports from Ceylon during recent years have averaged over 140 tons a year, the value in 1933 being about £25,000. Exports from the rest of the Colonial Empire are insignificant.

There is a large *entrepôt* trade in cardamoms and other spices in Malaya. In some cases the domestic exports form a small part of the whole, but in most cases the whole trade is a re-export one.

Cinnamon is the dried bark of shoots of the cinnamon tree (*Cinnamomum zeylanicum*) which is grown in Ceylon, South India, and the Seychelles. Some account of its preparation will be found in Section V.A. 1‡ of the memorandum on Ceylon. The bark is used as a food flavouring and also for the extraction of an essential oil (see the notice of Cinnamon Bark Oil under the heading of Essential Oils§).

So far as the Colonial Empire is concerned Ceylon is the chief source of supply. Exports in 1928 amounted to 1,735 tons of quills and 550 tons of chips valued together at about £375,000. By 1933 exports had increased to over 2,000 tons of quills and just under 400 tons of chips, but the total value had dropped to below £75,000. Exports from the Seychelles are valued at less than £500 a year. A small amount is now being exported from Grenada (nearly 7 tons valued at £188 in 1933).

Chillies, Capsicums or Red Peppers, are sometimes classed as a spice and sometimes as a condiment. There are three important species, which are cultivated in many of the warmer regions of the world and have a more extended area than any other spice. They are the fruit of a plant which is usually grown as an annual but can be grown continuously for two or three years. A very large proportion of the crop is used locally in a fresh state as a food flavouring, but substantial quantities are exported, usually as whole dried chillies to be ground in the importing country.

The principal source of commercial supplies is India, and chillies represent about half the total exports of Indian spices. The great bulk of the exports goes to Ceylon.

So far as the Colonial Empire is concerned, the principal countries of production are the East African Dependencies, Sierra Leone, Ceylon (which is also a producer, as well as a large importer from India), and certain Unfederated Malay States.

The value of exports from the Colonial Empire is relatively inconsiderable.

Cloves are dried unexpanded flower buds of *Eugenia caryophyllata*, plucked when they assume a bright pink or scarlet colour and generally dried in the sun with or without scalding. The tree is a native of the Moluccas (Netherlands East Indies) but has long been established in Zanzibar and Madagascar. Clove stems are the small stalks to which the buds are attached.

The tree begins to bear in the eighth or ninth year and reaches full production between the 15th and 20th year, then yielding from 3 to 8 lb. of dried cloves annually.

The original use of cloves was as a food flavouring, both in the unground and ground form, and this use is still important particularly in the East. During the last twenty years a practice has grown up in parts of Java of mixing shredded cloves with tobacco in the manufacture of two native forms of cigarette, the *kretek strootje*, with a leaf wrapper, and the *kretek cigarette* with paper wrapper, and large quantities of cloves are now imported into the Netherlands East Indies for this purpose. Cloves are also used in the East for other purposes, for instance for chewing with betel nut. The principal use of cloves to-day, however, in Europe and America is for the distillation of clove oil, which is used to some extent in that form and also for the manufacture of eugenol and (eventually) vanillin, an important flavouring substance. Clove stems are used exclusively for distillation. During recent years there has been an increasing manufacture of synthetic vanillin and this competition has exercised a very prejudicial effect on the price of cloves.

The most important source of supply of cloves is Zanzibar. There are about 3½ million clove trees in the Protectorate covering 16,000 acres in Zanzibar and 32,000 acres in Pemba, and the annual production during the last few years has varied between 9,000 and 13,500 tons.

The value of the exports of cloves and clove stems from Zanzibar in 1930 was nearly £750,000. By 1933, it had dropped to a little over £510,000, about 77 per cent. of the total domestic exports of the Protectorate.

The second most important source of supply is Madagascar. It is estimated that there are altogether about 5 million trees in the island, but for various reasons the exports are much less than those of Zanzibar.

There are also small areas under cloves in Ceylon, Malaya (about 355 acres in 1933), Seychelles, and the Netherlands East Indies. These Eastern cloves are superior in quality to the remainder but their quantity is very small.

Cubebs are the fruit of several species of pepper (*Piper*) of which the most important is *Piper cubeba* a native of the Netherlands East Indies. They are used for certain medicinal purposes and for the production of a volatile oil.

* See page 559.

† See page 158.

‡ See page 157.

§ See page 471.

There appears to be a small production in Malaya, but the trade, which is in any case very small, appears to be principally an entrepôt one.

Cumin (*Cuminum Cyminum*) is an annual herbaceous plant cultivated in India and the Mediterranean region. It bears a small ovoid seed rather like a caraway seed with a strong aromatic smell and a warm bitterish taste. It is used as a condiment, and also medicinally in veterinary practice.

The principal exporting countries outside the Colonial Empire are India and Sicily.

So far as the Colonial Empire is concerned the only exporters are Cyprus, which exported 294 tons valued at £8,341, and Malta, which exported 261 tons valued at £7,757 in 1933.

Ginger (*Zingiber officinale*) is a herbaceous perennial plant, originally a native of tropical Asia, but now cultivated in many tropical countries. The underground tuberous stems (rhizomes) are the ginger of commerce. They are called "hands" and are exported in two forms, peeled and unpeeled. The plant requires an equable hot and moist climate, a shaded situation and a rich soil and thrives up to an elevation of 3,500 feet in Ceylon. The average return in dry ginger is about 1,250 lb. per acre, but in favourable circumstances the yield may be as high as 2,000 to 2,500 lb.

Ginger is principally used in preserves and confectionery and also has certain medicinal uses. The ginger produced in the Colonial Empire is all exported in dry form. There is some export of ginger preserved in syrup from Hong Kong, as well as China, but this, although it is prepared for the market in the Colony, is manufactured from imported roots.

China is the largest exporter, and after that India.

In the Colonial Empire the most important producer is Jamaica, whose ginger is of the highest quality. Exports, which in 1929 were 950 tons valued at nearly £60,000, dropped in 1933 to a little over 740 tons valued at £31,000.

Sierra Leone is also a substantial producer. Exports in 1929 were about 1,548 tons valued at nearly £60,000, in 1933 the quantity remained practically the same, but the value had dropped to just over £16,500.

There are small exports from the Gold Coast and Nigeria, and endeavours are now being made to develop this trade.

There are also very small exports of ginger from Ceylon, Mauritius, the Leeward Islands, Trinidad, and the Windwards.

There are about 900 acres under ginger in Malaya, but the whole crop appears to be consumed locally and on balance Malaya is an importer of this product. There is also a small production for local use in Tanganyika Territory and Zanzibar.

Nutmegs and mace are both products of the nutmeg tree (*Myristica fragans*), originally a native of the Netherlands East Indies which has been introduced in Malaya and Grenada. The nutmeg is the hard brown oval kernel of the fruit and the mace is a lace-like covering surrounding the shell. The whole is encased in the flesh of the fruit, which bursts open when it reaches maturity.

The mace is first removed, flattened and dried in the sun, a process usually taking about ten to fourteen days. It is graded according to colour, the pale commanding the higher and the reddish a lower price.

The seed is then dried and cracked and the nutmeg removed. Nutmegs are valued by size, the three common grades averaging 65, 85, and 110 nutmegs to the pound, and a low grade of "cracked and wormy nuts."

The nutmeg contains a fixed fat, the "nutmeg butter" of commerce, which is removed by pressure. Both nutmegs and mace also yield an essential oil.

Both commodities are used principally as flavouring agents; nutmeg butter is used medicinally as a base for ointments, and oil of nutmegs and mace is used in perfumery and for flavouring liqueurs.

Nutmegs and mace are the second most important export of Grenada, exports in 1933 being about 1,414 tons of nutmegs and 221 tons of mace valued together at just under £60,000, about 32 per cent. of the total domestic exports of the Colony.

The other principal source of nutmegs and mace is the Netherlands East Indies, whose products command a rather higher price than those of Grenada.

Exports from the Netherlands East Indies are on an average about 3,000 to 4,000 tons of cultivated and 60 to 70 tons of wild nutmegs and between 650 and 750 tons of mace annually.

There are also small domestic exports from Malaya, where there were 82 acres under this tree in 1933, but the bulk of the trade is an entrepôt one.

There is a very small export trade from the Seychelles, Trinidad, and the other Windward Islands.

Pepper, the most important of the spices, is derived from a creeping vine (*Piper nigrum*) which is a native of the moist low-country forests of Ceylon and South India and has also been introduced into Malaya, Siam, the Netherlands East Indies, and Borneo.

Both "black" and "white" pepper are obtained from the same plant. The berries or pepper-corns are picked when they take on a reddish colour and dried in the sun. If ground with the outer covering left on they yield black pepper, but if the covering is removed by maceration in water the ground product is white pepper.

The pepper-vine requires moist heat with shade and artificial or natural support, that is, trellises or parent trees. It thrives up to an elevation of 1,500 feet. The vine begins to bear in the third year and comes to maturity in the sixth or seventh. It yields two crops a year, but only about one large crop in four. The average yield per acre is about 2,000 or 3,000 lb. a year.

The most important producer is the Netherlands East Indies which exports about 20,000 to 35,000 tons a year. India exports from 4,000 to 10,000 tons a year.

The only large exporter in the Colonial Empire is Sarawak where pepper is the second most important export crop, and the acreage in 1933 was estimated at 4,000 acres, as compared with 3,551 acres in 1932. Exports in 1929 were over 1,150 tons, valued at over £210,000. In 1933, the quantity had risen to over 3,200 tons, but the value had dropped to about £129,000, a little under 10 per cent. of all domestic exports.

There are small exports of pepper from the Gold Coast, Nigeria, Sierra Leone (under £1,500 in 1933), Ceylon (£2,000 in 1933, as against £30,000 in 1929), North Borneo, and the Bahamas.

There are about 50 acres under pepper in Malaya, but the very large trade in pepper is entirely an entrepôt one.

Pimento or **Allspice** is the dried unripe berry of *Pimenta officinalis*, a West Indian tree, which grows up to an elevation of 3,000 feet in Jamaica, but has not been grown commercially in any other country. Flowering commences in about the 7th to 10th year, and the tree comes to maturity at the 18th to 20th year. The tree grows both under plantation conditions and wild.

The yield varies a good deal but may reach an annual crop of a hundredweight of dried berries from each tree.

The berries have a taste resembling a mixture of cinnamon, cloves, and nutmeg and are used both as a ground spice and as a source of pimento oil (see under Essential Oils*).

Exports from Jamaica are mostly to foreign countries. The amount varies from about 3,500 to 5,000 tons annually. In 1929, a little over 4,000 tons were exported valued at £348,000. In 1933, the quantity was just over 4,000 tons, but the value had dropped to a little below £70,000, about 3 per cent. of the total domestic exports in that year.

Vanilla is now of little importance in the Colonial Empire. There was at one time considerable cultivation, but the trade was almost completely destroyed by the competition of foreign countries, chiefly Madagascar and French dependencies in the Pacific, and by the rise of synthetic vanillin.

There is still a small production in the Seychelles; about 10 acres are under the crop in the island of Praslin and about 9 cwt. valued at £77 were exported in 1933. There is also some production in Dominica, rather less than a ton valued at £395 having been exported in 1932, but exports in 1933 were practically nil.

Summary.

To sum up, cloves are the principal export of Zanzibar and represent a larger value than any other spice; nutmegs and mace are the principal export of Grenada; pepper is an important export of Sarawak; cinnamon and cardamoms are exports of substantial value to Ceylon, and pimento and ginger exports of substantial value to Jamaica. Other spices are relatively unimportant.

Spices have lost a substantial part of their value during the recent depression. In 1930, the aggregate value of the exports of spices and condiments from the Colonial Empire was over £1½ million; in spite of increased production, the value in 1933 was only just over £1 million.

SUGAR AND SUGAR PRODUCTS.

Varieties, Methods of Production, etc.

For ordinary purposes, "sugar" means sucrose, one of a large group of substances known to the chemist as sugars and including also glucose, fructose, etc., and valued for their sweetening and nutritive properties. Sucrose is by far the most important of the group commercially. It can be extracted from a number of plants (for example the maple tree, several varieties of palm and sorghum) but the great bulk of the world's sugar is obtained from the sugar-cane and the sugar-beet. The former grows in tropical and sub-tropical climates and the latter in temperate climates. The whole of the Colonial production for export is from the sugar-cane. Small quantities of palm sugar are produced for local consumption in certain Dependencies.

Refined white sugar is almost pure sucrose (about 99·8 per cent sucrose). "Unrefined" sugar contains more or less of impurities. The degree of purity is measured for commercial purposes in degrees of "polarization" (which measure the effect of the sugar crystal on a ray of polarized light). Absolutely pure sugar polarizes at 100°. White sugars of high purity can be produced by a direct process from cane and beet juices but it is usual, particularly with cane sugar, for "raw" dark sugar to be produced directly and for further refining processes to be carried out separately. These further refining processes are most cheaply done in large establishments and are mainly concentrated in the large consuming countries. The standard polarization of raw sugar is about 96° and most British West Indian (and Cuban) sugar is of that quality; but "raw" sugar polarizing up to nearly 99° is produced, notably in Mauritius. That Colony formerly produced white sugar polarizing even above 99°, which was sold for direct consumption; but since the adjustment of the United Kingdom sugar duties in 1928 a larger preference has been earned on sugar below 99° and Mauritius no longer exports any considerable quantity of sugar suitable for direct consumption. There is a small demand for special types of unrefined sugars (e.g. Demerara crystals and muscovado or brown sugar) for direct consumption and a few Colonial producers, notably in Barbados, Trinidad, and British Guiana, concentrate on such sugars.

The sugar-cane, a species of grass, grows very widely in tropical and sub-tropical areas where a certain minimum rainfall is obtainable. There are many varieties, suited to different climatic conditions, and the method of cultivation also varies with climatic conditions. Where rainfall is plentiful it is possible to grow canes for a number of years from one root stock (a practice

* See page 472.

known as ratooning); elsewhere the cane is replanted each year. The yield is very largely dependent on water-supply; in average West Indian conditions anything over 30 tons of cane to an acre is reckoned a good crop, but with irrigation in Hawaii over 100 tons per acre have been obtained.

The manufacture of sugar from the cane stalks consists essentially in the extraction of the sucrose and the removal of various organic and inorganic impurities. The average sucrose content of canes is about 13 per cent., though they vary widely; the sucrose is contained in the juice which is extracted by crushing the cane. After various impurities have been taken out, the juice is boiled until sufficient of the water has evaporated and the sucrose crystallizes and is separated out. The processes are simple in principle and can be carried out in primitive fashion with a hand-mill and an open pan; but cheap and efficient modern production involves the use of complicated machinery:—crushing mills with their auxiliary knives, shredders, etc.; multiple effect evaporators; vacuum pans, etc., and delicate chemical processes. It therefore demands considerable industrial and chemical skill; and, if full advantage is to be taken of mechanical aids and mass-production methods, factories of some size are required. The largest sugar factories in the world, in Cuba, can produce over 100,000 tons of sugar per annum; but a high degree of efficiency can be obtained from smaller units, down to about 5,000 tons capacity. The largest factory in the British Empire, the Ste. Madeleine factory in Trinidad, has a capacity of over 40,000 tons. An efficient factory extracts as sugar something like 90 per cent. of the sucrose in the cane and, with canes rich in sucrose, can make a ton of sugar out of 7-7½ tons of canes; a further percentage of sugar is obtained in the molasses and the percentage lost is small. A number of by-products are or can be produced, and the most important of these are mentioned below.

World Production.

World production in recent years has varied between about 24,000,000 and 28,500,000 long tons per annum. In the year ending 30th September, 1934, it was estimated at 25,081,000 tons, made up of 16,399,000 tons of cane sugar and 8,682,000 tons of beet sugar. The production of the Colonial Empire in that period was put at 832,000 metric tons, or about 3·3 per cent. of world production.

Colonial Production.

The sugar-cane is grown very widely in the Colonial Empire, and sugar of a primitive kind is manufactured for local use in many dependencies, but the production of the higher grades of sugar which enter into world trade is confined to (a) certain Colonies of the West Indian group, (b) Mauritius, (c) Fiji, and (d) East Africa. The Colonies which have an established export trade are Barbados, British Guiana, Fiji, Jamaica, the Leeward Islands, Mauritius, St. Lucia, St. Vincent, and Trinidad. Kenya and Uganda, which for a number of years have produced sugar for consumption within their own borders and in Tanganyika Territory, exported substantial quantities of sugar overseas for the first time in 1933. One or two smaller West Indian Colonies, for example Grenada and British Honduras, produce factory sugar but for local consumption only.

Up to a year or two ago the exports from the Colonial Empire averaged between 600,000 and 650,000 tons per annum, but they increased to about 700,000 tons in 1932 and 755,000 tons in 1933.

The largest Colonial producers are Mauritius, whose exports on the average represent about one-third of the whole; British Guiana, representing a little more than one-sixth; Fiji and Trinidad, each a little less than one-sixth; and Barbados, whose sugar exports have been about one-tenth of the whole but which also produces large quantities of a special type of molasses. The industry is of varying importance to the different territories; Mauritius, Barbados, Antigua, and St. Kitts are almost wholly dependent on it; in British Guiana and Fiji it is the greatest export industry and almost as important to the economic life of the Colony as it is in the Colonies of the first group; in Trinidad, St. Lucia, and Jamaica it is of considerable actual and great potential importance; only in Kenya and Uganda may it be regarded as a minor industry.

The organization of production in all cases centres round the factory, but varies considerably in the different dependencies. The greater part of the Colonial output comes from factories manufacturing anything from 5,000 tons to 40,000 tons per annum, but there are many smaller establishments. The largest factories (of, say, 10,000 tons capacity and upwards) are to be found in southern Trinidad, Fiji, St. Kitts, and Antigua; most of the factories in Mauritius, British Guiana, and northern Trinidad are intermediate in size (of 5,000-10,000 tons capacity); in Jamaica and Barbados although there are some factories of intermediate size, smaller factories are the rule. The supply of canes to the factories may be organized in several different ways; in British Guiana (and in East Africa) almost all the cane is grown on "estates" connected with particular factories and under the same ownership and control; in St. Kitts and Antigua the factory owners, as such, own no cane-lands but buy canes (in some cases on a profit-sharing basis) from planters or peasant farmers; in Fiji, where the whole industry is under the control of the Colonial Sugar Refining Company, Limited, of Australia, almost all the cane used is bought from peasant farmers occupying their own lands or lands leased from the Company; in Trinidad the "peasant-farming" and "estate" systems are combined; and in Mauritius, Barbados, and Jamaica all the systems mentioned are to be found. On the whole, the tendencies in recent years have been towards (i) increased size and centralization of factories; and (ii) greater development of peasant-farming as the most economical method of producing canes.

In all the Dependencies concerned increasing attention has been paid by the Government or the industry itself, or both, to the improvement of methods, utilization of new varieties of cane, measures against pests and diseases, and scientific research generally. Mention may be made of the work of the Imperial College of Tropical Agriculture, and the cane-breeding stations in Barbados, British Guiana, and Mauritius. Grants have been made to assist research from the Colonial Development Fund. Carefully planned manurial experiments are being carried out and important results have been obtained especially in the West Indian area. Cultivation by the Gyrotiller—a rotary power cultivator—has also been recently introduced with satisfactory results.

Marketing of Sugar in the British Empire.

The marketing of Colonial sugar can only be understood in relation to the general position of sugar in the Empire. The Empire may be divided into three groups; the exporting units, that is the Colonial Empire, Australia, and the Union of South Africa; the importing units which grant Imperial preference in respect of sugar, that is the United Kingdom and Canada; and the importing units which do not grant preference, that is India, New Zealand, and the Irish Free State (the non-exporting parts of the Colonial Empire are only small importers of sugar). The preferences in operation in the United Kingdom and Canada are large (being, for sugar polarizing at not more than 96°, that is standard raw sugar, \$1 per 100 lb. in Canada and 3s. 8-8d. per cwt., with additional preferences for Colonial sugar, in the United Kingdom) and amount, at the prices prevailing in recent years, to about fifty per cent. of the total price received by the Empire producer. Accordingly, except in special cases, it does not pay to export Empire sugar elsewhere than to the United Kingdom or Canada, and almost all the Colonial exports go to one of these two markets, the only noteworthy exceptions being occasional shipments from Fiji to New Zealand for special reasons. The total Canadian net imports are something less than 400,000 tons per annum and the United Kingdom net imports about 1,500,000 tons per annum. The available Empire supply has been some 650,000 to 750,000 tons from the Colonial Empire and 350,000 to 450,000 tons from the exporting Dominions, and in recent years almost the whole of the Canadian imports have been divided between Colonies and Dominions, the remaining available Empire sugar going to the United Kingdom. Lately the precise allocation between the two markets has been subject to some disturbance owing to exchange fluctuations and other factors.

Recent trend of prices, etc.

Sugar was affected very early by the world-wide fall in prices and difficulties of over-production. There was an excess of world production over world consumption in every year from 1926-27 to 1931-32 and stocks rose by nearly 4,000,000 tons. Prices fell from an average of 13s. 9d. per cwt. in 1927 to a low point of 3s. 10½d. sterling (2s. 4d. gold) in 1934. The British sugar-producing Colonies felt the strain very severely and grave economic and budgetary difficulties were threatened in several of them. Special assistance to meet the situation was given in 1932 by increases of preference in the United Kingdom amounting to 1s. per cwt. on all Colonial sugar and a further 1s. per cwt. on a limited quantity of such sugar. With this help, and by improved methods and reductions in costs (facilitated by the general fall in prices) the Colonies have been enabled to maintain production.

Meanwhile, efforts have been made over a long period to reach agreement among the principal sugar producers to meet the problems of over-production. In 1931, the leading exporting countries entered into the "Chadbourne" Agreement, the carrying out of which has led to a very large reduction of their output; but at the same time production in non-exporting countries has tended to increase. The question of arriving at a wider agreement, covering all the principal producers, was accordingly raised at the Monetary and Economic Conference in 1933; no agreement was then reached but His Majesty's Government expressed themselves favourably towards the principle of the proposal. Negotiations on the subject have continued and are still (July, 1935) proceeding, but show no immediate sign of coming to a successful conclusion.

Sugar products of the Colonial Empire other than raw sugar.

Refined sugar.—As already indicated the sugar-producing Colonies hardly manufacture any except raw sugar (the only exceptions are Jamaica, which produces a quantity of refined sugar for its domestic requirements, Trinidad where one factory has produced small quantities of refined sugar and Mauritius which produces white sugar nearly as pure as fully refined sugar). Hong Kong, however, although it is not a producer of raw sugar, has a considerable refining industry. Sugar is imported, mainly from Java, refined and sold partly for local consumption and partly for export to south China and other neighbouring territories. Figures of imports and exports in 1933 will be found in the memorandum on Hong Kong.*

A number of important **by-products** are obtainable from sugar-cane. They may be classified according to the stages of manufacture at which they are produced, as follows:—

- (1) Cane-tops, that is the green top leaves cut off the cane in the fields.
- (2) Cane trash, that is the dry cane leaves.
- (3) Bagasse, or megass, that is the fibrous residue coming from the mills after the juice has been crushed out.
- (4) Filtercake, that is the sediment yielded by certain purifying processes after the juice has passed through filter-presses.
- (5) Molasses, that is the viscous liquid remaining after separation of the crystallized sugar; it contains a fairly high percentage of uncrystallizable sugars and other valuable constituents. From it other products are obtained, viz.:—
- (6) Rum, by fermentation and distillation.
- (7) Power alcohol, by distillation and subsequent denaturing.
- (8) Solid carbon dioxide, by condensation of the carbon dioxide gas given off during fermentation.

The uses to which these by-products are put are as follows:—

- (1) **Cane-tops** form a valuable fresh food for cattle and several sugar estates in the Colonies run dairy farms in connexion with the estates.
- (2) **Cane trash** is used for cattle-bedding.
- (3) **Bagasse** is normally used for fuel in the factory, no other fuel being used. Other uses include the manufacture of a cattle food, molascuit, by mixture with molasses, and the production of fibre-board and insulating material. Several processes exist for the latter

* See page 172.

manufacture and there is a substantial commercial production (outside the British Empire) with possibilities of development. Bagasse can also be used as a raw material for paper, artificial silk and charcoal, and as a constituent of certain explosives. It is also being employed with advantage as a mulch between the rows of growing sugar canes where rainfall is somewhat low.

(4) **Filtercake** is normally used locally as fertilizer, but various substances, for example wax, can be extracted from it.

(5) **Molasses** may be used for the manufacture of alcoholic liquor (see below) or as sweetening material. Normally, unless it is used for the production of rum, it is sold for refinement into treacle and other syrups. It can also be used on certain soils as a fertilizer, with or without special treatment, and in Mauritius most of the molasses not used for rum-production is returned direct to the soil.

A special kind of molasses known as "fancy molasses" is manufactured in Barbados and sold for direct consumption. Unlike ordinary molasses, this is made direct from the cane-juice before any sugar has been extracted; it is not a by-product but an alternative to sugar and is composed of "invert sugars" which will not crystallize. The market for fancy molasses is practically confined to Canada and Newfoundland. Exports have in some years exceeded in value the exports of sugar from Barbados, and in 1933 amounted to 70,000 puncheons, equivalent to 23,000 tons of sugar.

(6) **Rum** is an important by-product in Jamaica, British Guiana, Trinidad, Barbados, and Mauritius. Apart from the amounts exported, there is considerable local consumption in these Colonies. Generally it is a subsidiary product, but a few small factories in Jamaica concentrate chiefly on rum production. The demand for the spirit has declined considerably in recent years owing to changes of taste and other factors and exports are on a lower scale than formerly. In Jamaica a good deal of attention has been devoted to the improvement of the quality of the rum and a few years ago the production of very concentrated "high ether" rums was developed; it has now, however, been agreed to discontinue the production of these rums, since it was found that they were being used as a basis for "synthetic" Jamaica rum consisting of a large percentage of natural alcohol, and were having a detrimental effect on the sales of genuine Jamaica rum.

(7) **Industrial alcohol** has been produced in several Colonies for local use. It has not so far achieved great commercial success but its possibilities are being further examined.

(8) **Liquid carbon dioxide**, commercially known as "dry ice," is coming into use as a preserving agent. There is a small production in Trinidad.

Summary.

Although there is some domestic consumption of sugar, rum, and other by-products in the sugar-producing Colonies, the industry is predominantly an export one.

Total exports of raw sugar, molasses and syrup, and rum from the Colonial Empire in the years 1930 to 1933 are set out in Tables XXX*, XXXI†, and XXXII‡.

The totals may be summarized as follows:—

	1930.	1931.	1932.	1933.
	£	£	£	£
Raw sugar	6,125,721	5,287,357	6,985,066	7,921,135
Molasses and syrup	382,770	544,047	551,290	586,648
Rum	191,289	137,072	119,042	153,242
	<u>£6,699,780</u>	<u>£5,968,476</u>	<u>£7,655,398</u>	<u>£8,661,025</u>

It will be seen that these figures compare favourably with those relating to most other agricultural products. There has been a very substantial recovery compared with 1930 and 1931. This was due partly to the increase in exports, but principally to the additional tariff preferences granted in respect of Colonial sugar by His Majesty's Government in the United Kingdom, the whole benefits of which have been reaped by the sugar producers themselves.

TEA.

Varieties, methods of production, etc.

There is no general agreement regarding either the terminology or the classification of the varieties or the habitat of the original wild plants from which the present cultivated varieties of tea have been derived. Broadly speaking, however, there are two main types of plant, the small leaved China-type and the large leaved India-type, with a great variety of hybrids lying between the two extremes.

Whatever the actual original habitat of the tea plant, there is no doubt that its cultivation and the production of made tea began in China, where tea-drinking can be traced back as far as the eighth century A.D. It was introduced into England early in the seventeenth century. The production of tea was, however, purely Chinese until the nineteenth century. It was established in India in the 'forties, in Ceylon in the 'seventies, and in various British territories in East and South Africa a little later in the century. As regards foreign countries it was established in the Netherlands East Indies at about the same time as in India; the date of its establishment in Japan and Formosa is uncertain, but it did not become an article of export from those areas until the second half of the nineteenth century. Tea is normally grown from seed but it may also be propagated by cuttings, by layering, or by grafting. The last method has been used in some countries for the establishment of tea seed gardens of uniform quality.

* See page 561.

† See page 562.

‡ See page 562.

Tea is almost always cross-fertilized and flowers self-fertilize only with difficulty. In these circumstances hybridization is the rule rather than the exception, and a pure strain can be maintained only by taking seed from isolated gardens of the variety desired.

Tea will grow almost anywhere where it is wet and warm, but certain climatic and soil conditions are required for profitable production.

It will grow over a wide range of latitude. The tea area furthest from the Equator is in Georgia, about latitude 42° N.; the tea gardens of Sumatra are situated actually on the Equator. The most important areas in order of importance are central and south-east China, north-east India, Ceylon, Java, Japan, south India, Sumatra, and Formosa.

The China varieties of the plant, with small leaves, are able to withstand cold and drought, but thrive in hot, humid climates; the India varieties with large leaves, do not do well in the colder and drier districts.

In China tea grows in districts with a rainfall of a little over 40 inches but the tea districts in Ceylon and India usually have a rainfall of from 60 to as much as 170 inches a year. It is essential that it should be well distributed through the year and the prevalence of mists is desirable if the total rainfall is under 70 inches.

As a broad general rule high temperatures and humidity give an abundant growth of leaf but not much quality, while lower temperatures and humidity give quality and flavour but a slower growth. Slowness of growth, however, does not necessarily bring with it quality; that depends also on other factors some of which, like soil, are known while others are unknown.

The young tea bush is in most cases not plucked till it is five years old, although in some districts the first plucking is at three years old; the bush is not in full bearing until after the seventh or eighth year.

Left to itself the bush would grow to 20, 30, or in some varieties as much as 60, feet in height, but it is regularly kept down to about three or four feet by pruning, to facilitate plucking and ensure a supply of young and tender shoots.

The growth of young leaf depends principally on climatic conditions and especially on rainfall, abundant rainfall particularly after a period of drought producing an abundant "flush" of leaves.

In Northern India the crop is seasonal and plucking is confined to about nine months, beginning in some districts in March and continuing to November or December; much, however, depends on the weather. More than half the crop is produced in July, August, and September. In southern India, Ceylon, Java, and Sumatra plucking is continuous throughout the whole year, but there are important seasonal variations, due mainly to the advent of the monsoon rains which, unless they are too heavy and cold, produce a more abundant "flush" of leaf. The times of the year at which the best tea is produced vary accordingly from one area to another.

The tea of commerce is made from the youngest and tenderest leaves of the flush and these are plucked by hand. "Two leaves and the bud" is the almost universal standard of plucking when quality is desired.

The gathered leaf is taken without unnecessary delay to the factory where it passes through several stages before it emerges as made tea.

The process of manufacture varies according as the final product is to be Black (or fermented) or Green (or unfermented) tea. There is a third variety of lightly fermented tea, known as Oolong, but the quantity of this tea is not large.

In order to produce Black tea the leaf must be withered, rolled, fermented, and fired.

The first stage—withering—occupies a period of from 10 to 30 hours, according to climatic conditions. The process must be reasonably slow and as even as possible.

The withered leaf is then rolled in rollers so that it is twisted and the internal juices are liberated by the breaking open of the cells in which they are contained. The rolling may be so carried out that a proportion of the leaf itself is broken and goes to form, without any subsequent cutting, part of the "broken" grades which are nowadays preferred for their superior liquoring quality.

After being rolled the leaves are spread out and left to ferment, the processes of rolling and fermenting generally taking together about three to four hours. The exact time varies and is generally fixed to coincide with the full development of the tea aroma.

The fermented leaves are then spread out on perforated or wire trays in a firing machine and submitted to a current of hot air of a temperature of from 180° to 220° F. for periods of from 25 to 40 minutes.

The tea is now black in colour and in its final form, but before being packed it is passed through sieves of varying mesh and sorted into grades.

During the process of manufacture, the leaf loses three-quarters of its weight.

In preparing Green tea the leaf is first heated to a temperature of about 160° F., which makes it soft and pliable for rolling and renders fermentation impossible. The heating is carried out either by steaming the leaf or by placing it in a hot iron pan. After heating the leaf is rolled and partially dried alternately till it is too crisp for further manipulation after which the drying is completed.

Market grades.

In the total tea production of the world probably as much Green as Black is manufactured, but the great bulk of tea prepared for export is Black.

Tea grown within the Empire and in the Netherlands East Indies is almost all Black; the recognized trade descriptions are:—Broken Orange Pekoe, Broken Pekoe, Orange Pekoe, Pekoe, Pekoe Souchong, Broken Pekoe Souchong, Fannings, and Dust.

A small quantity of Green tea is manufactured in India and Ceylon, usually under the designations of:—Young Hyson, Hyson 1 and 2, Gunpowder, Fannings, and Dust.

Up till recently Japan manufactured only Green tea, but during the last year or two has manufactured some small quantity of Black tea, grading it in the same grades as teas grown in India and Ceylon. Green teas from Japan are generally graded:—Panfired, Basketfired, Natural leaf and Siftings.

Most of the tea manufactured for export in Formosa is semi-fermented and is exported under the designations Oolong and Poochong.

Formosa has, however, recently commenced manufacturing Black teas which have so far been exported under some fancy mark and described simply as "Black tea."

Exported China Black teas are usually designated:—Congou, Moning, Keemun, and Ningchow, while the majority of the Green teas are graded:—Pingsuey, Gunpowder, and Imperial.

For export, tea is packed by machinery in chests and half chests, lined with lead or aluminium foil to protect the tea from the atmosphere. The broken grades are usually packed in half-chests, as they pack closer than the other grades and would overweigh the full size chests. The average net weight of the chests varies with the country and district of origin, but the weight of the chest is not usually much more or less than a hundredweight and the weight of a half-chest usually rather more than half the weight of the corresponding chest.

Made tea, even when packed in chests lined with lead or aluminium foil, only retains its quality for a limited period. The period varies with various grades of tea.

The tea sold to the public is almost always a blend of several grades.

The quality of the blend depends on the fine or "quality" tea included, but much of the bulk consists of common or "filler" tea which does not contribute in any way to the quality.

As regards quality and price, the better class of China tea stands apart, and is not a true competitor with Empire teas. The highest quality of Empire tea is Darjeeling, but there is a wide range of quality in the teas produced by each area. The order of average value is as follows:—Ceylon, North Indian, South Indian, Nyasaland, Sumatran, and Javan.

There has recently been a tendency for the difference in price between high and low grade teas to diminish.

World Production and Consumption.

By far the greatest part of the tea produced in China and Japan, and some of the tea produced in other countries, is consumed within the country of production and it is, therefore, not possible to estimate even approximately world production of tea. The major unknown factor is of course the production in China. This is usually estimated at between 600 and 1,000 million lb., but one estimate puts the figure as high as 2,000 million lb.

Statistics of exports from the principal producing countries are, however, available, and the following are the figures for the calendar year 1934:—

					<i>Million lb.</i>						<i>Million lb.</i>
India	...	...	...	...	340.8	Japan	...	...	...	...	32.0
Ceylon	...	...	...	...	218.3	Formosa	...	...	...	...	22.0
Netherlands East Indies	...	...	...	...	141.6	French Indo-China	...	...	...	...	2.0
China	...	...	...	...	103.8	African countries*	...	...	...	...	7.1

Total exports during 1934, therefore, amounted to about 867.6 million lb. of which about 65 per cent. originated in Empire countries.

Of foreign producers the Netherlands East Indies are strongly competitive with Empire producers, though the general level of quality is somewhat lower. The best qualities of China tea are of a special character and meet a special demand which on the whole is declining, but the lower qualities are competitive with the lower quality Empire teas. Until recently both Japan and Formosa confined their production to green teas, which do not compete with the Empire black teas, but both are now producing a certain quantity of black tea.

The tea industry is of very considerable importance to India and the Netherlands East Indies, but it is of far greater relative importance to Ceylon, the exports of tea from that Colony amounting to 62 per cent. of its total exports in 1932. The exports of tea from China and Japan are a relatively unimportant proportion of total exports.

The British Empire, in addition to being the predominant producer of tea for export is also the largest importer. Of all tea entering world trade more than one-half is retained in the United Kingdom which also has a considerable re-export trade. Australia is also a large importer and in all about 70 per cent. of all tea entering world trade is consumed within the Empire.

During the years 1923 to 1927 prices were high and considerable new areas were planted with tea. By the time these new areas were beginning to bear, it had however become obvious that production was outrunning consumption and prices were falling heavily. Exports from India, Ceylon, and the Netherlands East Indies which averaged about 577 million lb. annually in 1921-23, 673 million lb. in 1924-26 and 751 million lb. in 1927-29 rose to an average of 764 million lb. in 1930-32, while stocks, which had been as low as 166 million lb. in 1923 rose to 303 million lb. at the end of 1932, despite the fact that a voluntary restriction scheme was in operation in 1930.

In view of this unsatisfactory position negotiations for the restriction of output were reopened at the end of 1932 between the Indian Tea Association (London), the South Indian Association in London, the Ceylon Association in London, and the Tea Committee of the British Chamber of Commerce of the Netherlands East Indies, acting on behalf of Java and Sumatra producers; and in February, 1933, agreement was reached on a scheme of regulation, which was supported by over 90 per cent. of the producers in each country and has been put into effect by Government action.

The scheme was to remain in force for five years, and provides *inter alia* for:—

- (1) Government restriction of exports to agreed quotas.
- (2) The fixing from time to time of a quota for each country, which is a fixed percentage of its "standard export", that is the maximum export reached by that country in any of the three years 1929, 1930, and 1931.
- (3) The establishment of an International Tea Committee representative of the producers to administer the scheme and fix the quotas. (The internal distribution of the quotas among producers is left to the respective local authorities.)
- (4) Prohibition of the extension of existing tea areas with limited exceptions.
- (5) Prohibition of the export of tea seed from the countries parties to the scheme.

* Excluding exports from one part of Africa to another.

The standard exports under the scheme are:—

<i>Country.</i>	<i>Basic year.</i>	<i>Standard Export.</i>
		lb.
India	1929-30	382,594,779
Ceylon	1929	251,522,617
Java	1931	173,597,000
Sumatra	1931	
		807,714,396

The quota for the first year, i.e. 1st April, 1933, to 31st March, 1934, was fixed at 85 per cent. of standard export. This cut resulted in a reduction in stocks and a rise in price. For the second year, 1934-35, the Committee fixed the quota at 87½ per cent. Consumption however fell and exports from outside the regulation scheme increased, with the result that at the end of 1934 stocks reached a record figure. The quota for 1935-36 has therefore been reduced to 82½ per cent., representing a total export from India, Ceylon and the Netherlands East Indies of some 686 million lb.

Negotiations have been instituted to secure the adherence to the scheme of other tea-producing countries within and without the Empire. The East African territories have agreed to co-operate by the restriction of new planting.

Restriction of export in the case of a perishable commodity like tea is equivalent to restriction of production, and this can be effected by "fine plucking" that is by selective plucking of the younger leaves only. The result is that production is restricted and quality at the same time improved.

Colonial Production.

The position of the tea industry in Ceylon has been set out above and further particulars will be found in the memorandum on Ceylon in Part I.*

The only other part of the Colonial Empire in which tea is produced in substantial quantities is East Africa.

In Nyasaland, the industry has been established on a commercial scale for over 30 years and is of substantial, but not major, importance, exports in 1933 representing about 11½ per cent. of total exports. The area under tea in 1934 was some 15,700 acres. Under the agreement with the International Tea Committee, new planting is limited to 2,000 acres. Exports were a little over two and a half million lb.

In Kenya, the industry is of more recent date but is now of some importance. The area under tea in 1934 was some 12,000 acres and production was nearly two and a half million lb. The greater part of this however was absorbed by the domestic market and exports were under three-quarters of a million lb. New planting is limited to 1,000 acres.

In Tanganyika Territory, 2,500 acres are planted and new planting may take place up to a total of 5,400 acres in all. In Uganda, 740 acres have been planted with tea: a further 2,000 acres may be planted. Tea has been grown experimentally in Malaya, but is still in the very earliest stages. There is one estate of 700 acres now in bearing in Kedah (Unfederated Malay States) and experimental trials have been made in the Cameron Highlands. A small area of tea is grown in Mauritius but its produce is all consumed locally in the Colony.

Table XXXIII† shows the quantity and value of the total exports of tea during the years 1930 to 1933. It will be observed that during this period the quantity exported increased slightly, from about 245 to about 256 million lb. weight, until 1933 when the quantity decreased to 223,000,000 lb. The value dropped from nearly £13½ million to between £8 and £8½ million in 1932, but the increase in price in 1933 added over £830,000 to the value of that year's exports. Even at this reduced figure, however, tea remains one of the most important exports of the Colonial Empire.

TIMBER.

The forests of the Colonial Empire cover very large areas, and some account of the forest resources of the various Dependencies of the Colonial Empire will be found in the relevant section (V.A.2) of the various memoranda in Part I of this volume.

Table XXXIV‡ shows the total exports of "timber and wood" from the Colonial Empire in the years 1930 to 1933. It will be noted that the total value was rather over £1 million in 1930 and only just over £680,000 in 1933.

These figures, of course, in no way represent the importance of its forests to the Colonial Empire. In addition to the exports there is a very large production of timber and other forest products for local consumption; for instance it is estimated that the annual value of the internal trade of Nigeria is not less than £2,800,000. There is every prospect of developing production of timber in a number of Dependencies, both in order to increase exports and also in order to supply from local resources, which are readily available and of excellent quality, timber requirements which are at present met by imports.

It would be beyond the scope of the present volume to give an account of the steps which are being taken to promote this development work.

At the present time there are only two Dependencies where timber is the principal export, viz., the State of North Borneo and British Honduras.

The State of North Borneo is now the largest timber exporter in the Colonial Empire, the value of its timber exports in 1933 being about £267,000.

* See page 154.

† See page 563.

‡ See page 564.

The characteristic timbers belong to the natural order *Dipterocarpaceae* the principal kinds exported being red seraya (*Shorea* spp.) and white seraya (*Parashorea* spp.). Smaller quantities of Kapur (*Dryobalanops* spp.), belian (*Eusideroxylon Zwageri*) and Keruing (*Dipterocarpus* spp.) are also shipped.

In the case of British Honduras there has been a great alteration in the relative importance of the various exports owing to the complete collapse in the demand for mahogany which was one of the features of the recent general depression, but even in 1933 forest products represented 70 per cent. of all domestic exports, and of this 70 per cent. between one-third and one-half was represented by timber logs and lumber. There is now some prospect of a revival in this trade. A modern saw-mill has recently been erected in Belize which should make it possible to retain under British control a large part of the lumber trade in British Honduras mahogany hitherto carried out by firms in the United States of America.

There are a few other Dependencies where timber exports are of some importance either absolutely or relatively to the other exports of the Dependency. In Nigeria and the Gold Coast there are substantial exports of mahogany and other hardwoods e.g. iroko (*Chlorophora Excelsa*), African Walnut (*Lovoa Klaineana*), obeche (*Triplochiton Scleroxylon* and *T. Nigericum*), abura (*Mitragyna stipulosa*), mansonie (*Mansonie altissima*). Of mahogany alone the value of Nigeria's exports in 1929 were nearly £½ million and that of the Gold Coast's exports over £100,000, but in 1933 these values had fallen by three-quarters. Steps are now being taken to revive this trade.

There are substantial exports of logwood from Jamaica, but it is perhaps doubtful whether they should be classified as timber since they are used for the manufacture of logwood extract, a dyeing substance. In 1933, the value of exports of logwood was nearly £70,000 of which 60 per cent. went to France and 40 per cent. to the United States of America and in addition locally manufactured logwood extract to a value of over £100,000 was exported, about 85 per cent. of it to the United Kingdom.

There are substantial exports of lumber of various sorts from the Bahamas, the value in 1933 being nearly £23,000. The sum is not a large one, but the export is of some importance to the Colony, representing as it does about 15 per cent. of all domestic exports.

British Guiana possesses a number of hard woods of special interest and is the only commercial source of the invaluable greenheart (*Ocotea Rodioei*, belonging to the natural order *Lauraceae*) a timber of outstanding strength and durability and with great powers of resistance to the attacks of marine borers and to insect attack. Exports, which in 1930 were valued at over £28,000, were valued at about £25,000 in 1933.

The total value of this and British Guiana's other timber exports in 1933 was rather over £27,000, a little over 1 per cent. of the total value of domestic exports.

The value of timber exports from Malaya dropped from nearly £153,000 in 1930 to rather over £80,000 in 1933; a substantial, though unascertainable, part of these exports was not of domestic origin. There is a small but promising export of timber from the Federated Malay States to the United Kingdom, the woods chiefly concerned being red meranti (*Shorea* spp.) and Keruing (*Dipterocarpus* spp.).

Timber is also exported from Sarawak, the value of exports in 1933 being just on £14,000.

It would be beyond the scope of the present volume to give a complete account of the various sorts of timber grown in the Colonial Empire.

The most important of these is mahogany, a name applied to a number of timbers of various botanical origins. There is a good deal of dispute regarding the propriety of using the name "mahogany" for certain of these timbers. The principal Colonial varieties are:—

- (1) British Honduras mahogany (*Swietenia macrophylla*).
- (2) The closely allied West Indian or "Spanish" mahogany (*Swietenia mahagoni*) occurring, or grown in the Bahamas, the Leewards, Trinidad, and other West Indian islands.
- (3) African mahogany (several species of *Khaya*, in particular *ivorensis*) occurring in Nigeria, the Gold Coast, and Uganda.
- (4) Sapele mahogany or Gold Coast cedar (mainly *Entandrophragma cylindricum*) occurring in the Gold Coast, Nigeria and Uganda.
- (5) British Guiana mahogany or Crabwood (*Carapa guianensis*) called Crappo in Trinidad.
- (6) Nyasaland mahogany (*Khaya nyasica*).
- (7) Mupumena (*Entandrophragma* spp.) occurring in Northern Rhodesia.

Next in importance probably comes cedar, a name also applied to a variety of timbers of different botanical origin, including the cedar of Cyprus and Palestine, which is identical with the "cedar of Lebanon," (*Cedrus Libani*) the pencil cedar of Kenya and Tanganyika Territory (*Juniperus procera*), also called cedar or juniper in Somaliland, Borneo cedar, including White Seraya (*Shorea* spp.) and the West Indian cedars (*Cedrela* spp.) exported in small quantities from British Guiana, British Honduras, Trinidad, and the Windward Islands.

A variety of other timbers is produced in the Colonial Empire and the following list, which does not of course profess in any way to be a complete list of all Colonial timbers, shows those timbers which are mentioned in the memoranda in Part I and in the Export Returns of various Dependencies, together with some of the Dependencies in which they are grown:—

- Abura (*Mitragyna stipulosa*):—West Africa.
 Alder (*Alnus orientalis*):—Cyprus.
 Balau (*Shorea materialis*):—Malaya.
 Balata (*Mimusops Balata*):—British Guiana, Trinidad.

- Belian** (*Eusideroxylon Zwageri*):—North Borneo.
- Bitterwood** (*Picraena excelsa*):—Jamaica.
- Bloodwood** (*Pterocarpus angolensis*):—Northern Rhodesia.
- Borneo Camphorwood** or **Kapur** (*Dryobalanops aromatica* and other species):—Malaya and the Dependencies in Borneo.
- East African Camphor** (*Ocotea usambarensis*):—Kenya, Tanganyika Territory.
- Chengal** (*Balanocarpus Heimii*):—Malaya.
- Cocus** or **Green Ebony** (*Brya Ebenus*):—Jamaica.
- Cypre** (*Cordia alliodora*):—Trinidad.
- Cypress** (*Cupressus sempervirens*):—Cyprus.
- Damask**:—Somaliland.
- Ebony** (*Diospyros* spp.):—West Africa, Ceylon.
- Eucalyptus**:—Nyasaland.
- Fustic** (*Chlorophora tinctoria*, a dyewood):—Jamaica, Trinidad.
- Galba** (*Calophyllum antillanum*):—Trinidad.
- Gharu** (*Gonystylus* spp.):—North Borneo, Sarawak.
- Greenheart** (*Ocotea Rodioei*):—British Guiana.
- Guatcare** (*Lecythis laevifolia*):—Trinidad.
- Gurjun** or **Keruing** (*Dipterocarpus* spp.):—Ceylon, Malaya, North Borneo.
- Hora** (*Dipterocarpus zeylanicus*):—Ceylon.
- Iroko African teak**, **Nigerian teak** (West Africa), **Mvule** (East Africa) derived from *Chlorophora excelsa*:—West and East Africa.
- Jakwood** (*Artocarpus integrifolia*):—Ceylon.
- Jereton** or **Match Wood** (*Didymopanax morototoni*):—Trinidad.
- Kauri** (*Agathis* spp.):—New Hebrides.
- Laka** (*Dalbergia parviflora*):—Sarawak.
- Laurier** (species of *Nectandra* *Ocotea* and other *Lauraceae*):—Trinidad.
- Lignum vitae** (*Guaiacum* spp.):—Bahamas, British Honduras, Jamaica, etc.
- Logwood** (*Haematoxylon campechianum*):—Bahamas, British Honduras, Jamaica, Windwards, etc.
- Mangrove** (*Rhizophora* spp.):—East and West Africa, Malaya, North Borneo.
- Mora** (*Mora excelsa*):—British Guiana, Trinidad, etc.
- Oak** (*Quercus* spp.):—Cyprus.
- Obeche** (*Triplochiton scleroxylon*):—Nigeria, Gold Coast.
- Olive** (*Olea* spp.):—Cyprus, Palestine, East Africa.
- Palu** (*Mimusops hexandra*):—Ceylon.
- Pine, Abaco**:—Bahamas.
- Pine, Aleppo** and **Troödos** (*Pinus halepensis* and *P. Laricio* var. *pallasiana*):—Cyprus.
- Plane** (*Platanus orientalis*):—Cyprus.
- Podocarpus**:—Kenya, Tanganyika Territory.
- Purpleheart** (*Peltogyne pubescens* and *P. porphyrocardia*):—British Guiana and Trinidad.
- Rhun palm** (*Borassus flabellifer* var. *aethiopum*):—Gambia.
- Rosewood** (*Dalbergia Stevensonii*):—British Honduras.
- Sandalwood** (*Santalum* spp.):—New Hebrides.
- Sandalwood, West Indian** (*Amyris balsamifera*):—Jamaica.
- Satinwood** (in Ceylon *Chloroxylon Swietenia*, in the West Indies *Zanthoxylum* spp.):—Ceylon, Jamaica, etc.
- Teak, Rhodesian**, or **Zambesi redwood** (*Baikiaea plurijuga*):—Northern Rhodesia.
- Teak, Borneo** or **Selangan batu** (*Hopea* and *Isoptera* spp.):—North Borneo.
- Teak, Island**:—New Hebrides.
- Trincomalee Wood** (*Berria ammonilla*):—Ceylon.
- Wallaba** (*Eperua* spp.):—British Guiana.
- Walnut, African, Nigerian** or **Benin** (*Lovoa Klaineana*):—West Africa.

Some mention should also be made under this heading of **bamboo**, of which there are large areas in East Africa and **rattan** which is produced in substantial quantities in Malaya and the Dependencies in Borneo. There are not at present any exports of bamboo from East Africa, although it is used locally for a variety of purposes.

There are substantial exports of canes and rattans from Malaya, but it is impossible to distinguish the domestic exports since they are included with a large volume of re-exports of canes and rattans imported for cleaning, sorting, and grading from neighbouring foreign countries.

TOBACCO.

Method of Production, Varieties, etc.

Tobacco is the dried and prepared leaves of species of the plant *Nicotiana* of which *N. Tabacum* is the most important. The crop is an annual one, being grown from seed.

The leaves, after suitable preparation, are used for smoking and chewing purposes and for inhalation as snuff. Snuff is commercially of little importance compared to other tobacco products. There are no other important uses of sound leaf, but considerable quantities of waste tobacco are used for the manufacture of nicotine and nicotine preparations which are used as insecticides in horticulture.

The leaves are collected when ripe and treated successively by "curing", "fermentation" and "ageing".

Curing is effected by several different methods.

Sun-curing, i.e., curing by exposure to the rays of the sun, is practised largely in Eastern countries.

Air-curing is effected by hanging the leaves in barns with free circulation of air. Cigar leaf and "White Burley" are usually so cured.

For *fire-curing* the tobacco is hung in barns and exposed to the heat of open wood fires, the products of combustion coming into contact with the tobacco. After harvesting the leaves are allowed to wilt for a short time and are then hung in the barns, where in the course of a few days they develop a rich yellow colour. When this stage is reached, slow fires are started on the floor beneath the tobacco. The heating is slowly increased during the next few days, and is then carefully regulated so as to effect an even curing of the leaf and a gradual change in colour to brown.

In the process of *flue-curing* the leaves are cured in barns by artificial heat derived from fires in external or internal furnaces. The hot air and smoke are carried through the barn beneath the hanging tobacco in flues of sheet iron pipe. In this method the smoke does not come into contact with the leaves. Flue-curing is employed for the production of "bright" tobacco, and needs more skilful supervision than any other process. The temperature and ventilation of the barn must be under strict control. The process consists of three distinct stages:—(1) yellowing, (2) fixing the colour, and (3) drying.

After curing, all tobacco is stacked in heaps and moved from time to time. The object of this, in the case of air- and flue-cured tobacco, is to improve the appearance of the tobacco and remove any residual green colour and the process is usually completed in some days. Fire-cured and cigar tobacco, however, are left in the stacks till the leaf has fermented. In order to allow this natural process to take place a period which is usually about a month, but varies according to the weather, is required.

As soon as this process is complete, the tobacco is graded and pressed into bales or hogsheads and stored in warehouses either in the country of origin or, more usually, elsewhere, in a moderate and fairly uniform temperature, where it may remain in some cases for as long as several years to mature and "age".

Owing to the fact that tobacco must be "aged" before it is fit for use, there are always stocks representing a number of months' normal consumption in store. Two years' stocks are not an abnormal quantity, and the existence of these stocks, provided they are not obviously excessive, does not indicate that the commodity is in over-supply.

The quality of the leaf depends not only on its growth in suitable conditions, but also on the proper performance of the subsequent processes.

It is exceptional for any tobacco product to be manufactured exclusively from a single grade of leaf; nearly all are blended from a variety of leaves possessing different qualities, and it is the expert blender, who makes these mixtures, that must be satisfied that the leaf offered to him possesses the qualities which he requires.

Tobacco can be grown in almost any climate, tropical or temperate, but its quality depends on a great variety of climatic, soil, and other conditions which are so far very imperfectly understood, and it cannot be predicted in advance with any confidence either that a particular area will be suitable for tobacco cultivation, or that a particular variety of seed which is satisfactory in one area will be satisfactory in another.

Broadly speaking, tobacco is ready for picking in the late summer, but in some tropical countries there is no marked distinction between the various seasons, and in any case the curing and fermentation which must be carried out in the country of origin necessarily produce a lag in the arrival of the crop in overseas markets. The following are the months during which the annual crops of certain countries reach the United Kingdom:—

Nyasaland, June to December.

Northern and Southern Rhodesia, August to January.

Canada, February and March.

India, June to October.

United States of America, October to March.

As stocks are normally retained in bond in the United Kingdom for a prolonged period before withdrawal there is no marked season for sales.

Broadly speaking, there are four *main* classes of tobacco, each divided into a very large number of sorts and grades, viz.,

Leaf for making cigars.

Leaf for making the Virginian type of cigarette.

Leaf for making the Turkish type of cigarette.

Pipe tobacco.

The terms "Virginia" and "Turkish" have entirely lost their original geographical significance and are now descriptive only of kinds of tobacco.

Tombac or *tumbeki*, the special kind of tobacco used in water pipes in the Near East, is a coarse oriental tobacco of little importance from the point of view of world commerce.

Apart from a very small use in cigarettes, cigar leaf is used for no other purpose. A cigar is made up of "filler", "binder" and "wrapper" leaves, and very different qualities are required of the leaves used for these different purposes.

The line drawn between cigarette and pipe tobaccos is not an absolutely rigid one, but a typical pipe tobacco is usually unsuited for cigarettes and it is only a few pipe mixtures that contain a proportion of cigarette tobacco. Broadly speaking a leaf of finer texture is required for cigarettes, while pipe tobacco is darker. In some growths of tobacco the heavier and the finer leaves of the same plant are used for the two different purposes.

The countries now producing these kinds of tobacco are, broadly speaking, as follows:—

Cigar Leaf.—Cuba, the Philippines, the Dutch East Indies, India; small quantities in North Borneo, Jamaica, Brazil, and Porto Rico. Jamaica produces a filler leaf only.

Virginian Cigarette Leaf.—The United States of America, Canada, Southern Rhodesia, India; small quantities in Australia, Nyasaland, Northern Rhodesia, New Zealand, and Germany.

Turkish Cigarette Leaf.—Greece, Bulgaria, Turkey, and various Asiatic countries; small quantities in Cyprus, Palestine, Southern Rhodesia, and the Union of South Africa.

Pipe Tobacco.—Canada, India, Southern Rhodesia, Nyasaland, Northern Rhodesia, Australia, New Zealand, the Union of South Africa, the United States of America, and a number of other foreign countries.

World Production.

There is no means of discovering even approximately the total world area under tobacco. The major factor of uncertainty is, as usual, China, where the area has been estimated to be in the region of 400,000 acres, but there are also other countries regarding which there is much uncertainty. It is believed that, excluding China, between 6½ and 7 million acres are under this crop. Of this total probably over 2 million acres are in the United States of America and over 1,350,000 acres in India. There is some tendency for the area to fluctuate from year to year, but on the whole there is a steady increase, particularly within the British Empire.

Where figures of area are not available, no useful deductions can be drawn from production since the yield per acre varies considerably. In those countries such as Russia and China, where a coarse, poor quality, leaf is grown the yield may be as much as 1,500 to 2,000 lb. per acre. In India, the average is about 1,000 lb., in the United States of America, about 750 lb., and in Cuba (for cigar tobacco), about 425 lb. per acre. In unfavourable weather conditions even lower yields have been known.

Figures of production are almost as imperfect as figures of acreage, but omitting China (where the production is believed to be large, although imports are also very large) and the minor producing countries, it is estimated that the average annual production during the period 1926 to 1930 inclusive was of the order of 1,900,000 tons of which about 586,000 tons were produced in India, about 40,000 tons in the rest of the Empire, and the rest in foreign countries, of which about 635,000 tons were produced in the United States of America. As stated above this is an average figure, and the actual output in 1930 was substantially above it; for instance the production of the United States of America in 1930 was about 733,000 tons.

Compared to the figures of world production the exports of unmanufactured tobacco from the Colonial Empire shown in Table XXXV* are relatively unimportant. It will be seen that the largest exports were in 1932, when the total reached about 8,600 tons or less than one-half of one per cent. of estimated world production.

World Consumption.

Of the total amount produced more than half is consumed in the country of production, and the average exports from the principal consuming countries during the period 1926 to 1930 were no more than 490,000 tons, of which India contributed only about 13,000 tons, the rest of the Empire about 14,000 tons and the United States of America about 246,000 tons.

Almost every country which does not produce tobacco imports it, and even some producing countries import it also. In the years 1928 to 1930 on an average the United Kingdom and Germany each imported over 100,000 tons, China between 50,000 and 60,000 tons, France between 40,000 and 50,000 tons and the Netherlands and Spain about 30,000 tons. Australia imported about 10,000 tons and Canada about 8,000 tons. In the case of the United Kingdom the figure given is that of gross imports. In 1934, gross imports were 107,000 tons and retained imports, 80,000 tons.

Recent figures of *per caput* consumption are not available, but the following figures are of interest as giving some indication at any rate of the variation between different countries:—

Country.	Year.	Quantity in lb. consumed per head of population.
United Kingdom	1914	2·4
	1927	3·4
Belgium	1926	6·6
United States of America	1926	6·02
Germany	1926	4·0
New Zealand	1926	3·1

* See page 566.

The following table shows the imports, exports, clearances for home consumption and warehouse stocks of unmanufactured tobacco in the United Kingdom over the last five years.

Year.	Imports.			Re-exports.	Retained for home consumption.		Warehouse stocks.
	Foreign.	Empire.	Total.		Foreign.	Empire.	
	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.	'000 lb.
1930	201,690	35,338	237,028	13,535	125,286	25,652	462,847
1931	159,718	34,328	194,046	8,049	121,645	28,178	455,191
1932	127,704	47,708	174,912	8,786	117,713	31,496	434,635
1933	161,916	49,192	211,108	9,908	114,799	34,302	437,350
1934	191,634	47,625	239,259	18,266	158,360	40,545	447,494

It will be seen that the clearances of Empire tobacco rose consistently to a peak in 1933 (23·66 per cent. of the total) but fell off slightly in 1934 (23·22 per cent.).

There has been a steady diminution in the consumption of cigars and pipe tobacco accompanied by a marked increase in the consumption of cigarettes.

The duties on tobacco in the United Kingdom are as follows:—

		Duty per lb.	
		Full.	Preferential.
Unstripped:—			
Containing 10 per cent. of moisture or over	...	9s. 6d.	7s. 5½d.
Containing less than 10 per cent. of moisture	...	10s. 6d.	8s. 2½d.
Stripped:—			
Containing 10 per cent. of moisture or over	...	9s. 6½d.	7s. 5½d.
Containing less than 10 per cent. of moisture	...	10s. 6½d.	8s. 3½d.

The margin of preference of 2s. 0½d. per lb. is guaranteed until the 19th of August, 1942, by Section 4 of the Ottawa Agreements Act.

The preference has been of the greatest possible value to the Colonial tobacco industry and has been the principal cause of the increase in the consumption of Empire tobacco in the United Kingdom. While precise information is not available, it is estimated that as much as 75 per cent. of all pipe tobacco sold in the United Kingdom may now be of Empire origin. The proportion of Empire tobacco included in cigarettes remains, however, small.

Nearly all tobacco exported from Empire countries is sent to the United Kingdom and in many cases is already the property of the manufacturers before it is moved. At present the sale of Empire tobacco to foreign buyers remains small though increasing.

Colonial Production.

So far as the Colonial Empire is concerned, the principal areas of production are East Africa and Ceylon. Production in other Dependencies is relatively small.

Kenya is not a producer and the tobacco exports from "Kenya and Uganda" are in fact all of Uganda origin.

In Uganda there is a steady increase in production by Europeans and, in particular, by natives. The greater part of the crop is used at a local tobacco factory at Jinja, but exports, both to other parts of East Africa and overseas, are steadily increasing, though the value is still relatively small (£31,000 in 1933). The area under cultivation in 1933 was over 4,000 acres.

In Tanganyika Territory, tobacco-growing is being encouraged, but the industry is still in the initial stages. The area under tobacco is about 4,000 acres and exports in 1933 were valued at £36,887, an increase of over £30,000 over 1932.

In Nyasaland, tobacco is the principal export crop and in 1933 accounted for about 76 per cent. of all exports. In that year 7,862 acres of tobacco were cultivated by Europeans and 20,146 acres by natives, the former growing chiefly flue-cured and air-cured leaf and the latter dark fired. The total production in 1933 was 5,634 tons, of which 4,640 tons, valued at £389,794, were exported, the whole (except nearly 5 tons), going to the United Kingdom.

In Northern Rhodesia, tobacco is the principal agricultural export, but owing to the predominant position of minerals in the economic life of the community the value of tobacco exports in 1933, about £35,000, represented less than one per cent. of total domestic exports. About 2,200 acres are under the crop. About 1,267,000 lb. were produced of which a little under a million lb. were exported, about one half to the United Kingdom and the remainder to the Union of South Africa, and Southern Rhodesia.

A little native tobacco is grown in Zanzibar and there are small exports (£366 in 1933).

Tobacco is grown for local consumption in parts of West Africa, but there are no exports and very large imports, chiefly of foreign tobacco both unmanufactured and manufactured.

In Ceylon, tobacco is a moderately important minor industry, and it is estimated that about 14,000 acres are under this crop. Part of the crop is manufactured into cigars for local consumption and the remainder is exported to India for chewing. There is also a small production of White Burley tobacco which is exported to the United Kingdom. Exports vary between about 1 and 3 million lb. annually. The value in 1933 was about £73,000 or about one-half of one per cent. of total domestic exports.

In Malaya there are small areas under tobacco in the Straits Settlements and all the Malay States, but the whole production is consumed locally. In addition there are very large imports of tobacco, both unmanufactured and manufactured.

In North Borneo there has, for many years, been an important production of cigar wrapper leaf, the only tobacco of its kind produced in the Empire. Exports in 1933 were valued at about £74,000.

Tobacco cultivation has recently been established in Mauritius and in 1933-34 about 2,000 acres were under this crop. Production is now sufficient to supply the domestic market, but no appreciable quantity has yet been exported.

In Cyprus the tobacco industry is an old-established one and, after a recent setback, is now advancing again. Two types of leaf are produced, a dark fumigated leaf of Latakia type for pipe mixtures and a bright leaf of "Turkish" type for cigarettes. In 1933, about 370,000 lb. were exported valued at £12,407, a little over one per cent. of total domestic exports. A monopoly of export of the bright leaf has recently been given to the Cyprus Cigarette Co., Ltd.

In Palestine there is a substantial production of tobacco, the crop in 1933 being estimated at about 1,260,000 lb., of which 95 per cent. were of "Turkish" type. Of this only about 1,000 lb., valued at £121, were exported and the remainder was used in the local factories.

In Jamaica two types of tobacco are grown. Of these one, which is not grown in the Colonial Empire except in Jamaica and the Leewards, is suitable for use as a cigar "filler". The greater part of it is used in the local cigar factory and only about 76,000 lb. of unmanufactured tobacco, valued at nearly £5,000, were exported in 1933. About 40,000 lb. of cigars, valued at about £23,100, were also exported. The other form of tobacco is "rope tobacco", which is produced in small quantities for local consumption.

The industry in the Leewards is of the same kind as in Jamaica, but on a much smaller scale.

Tobacco for local consumption is also grown in a number of other West Indian Islands.

In Fiji, tobacco grows luxuriantly and is largely used for local consumption. The industry has not, however, yet reached the export stage, although experiments in suitable types are in progress.

Summary.

To sum up, tobacco is a product which is still of relatively small importance to the Colonial Empire, but that importance is growing every year. Several Dependencies are becoming increasingly self-sufficient and are approaching the export stage. In 1930, the value of exports of unmanufactured tobacco (shown in detail in Table XXXV*) and cigars manufactured almost entirely from locally grown leaf (shown in detail in Table XXXVI†) was just over £736,000. In 1933, the value dropped to just over £630,000.

VEGETABLES AND TUBERS.

The vegetables and tubers produced in the Colonial Empire can conveniently be divided into two main groups:—

- (1) "ground provisions," that is roots or tubers, and
- (2) other vegetables.

One or two manufactured products derived from tubers have been included in the first group.

Generally speaking the production of vegetables and particularly tubers is of great economic importance to a considerable number of Dependencies, but that production is almost entirely for domestic consumption and the export trade is small and confined to a very limited range of articles.

Ground provisions.—A great variety of vegetables of this class is grown in the Colonial Empire. The most important are yams, sweet potatoes, and cassava, which supply to the inhabitants of the tropical and sub-tropical regions an abundance of wholesome and nutritious food and occupy as important a place as the common potato does in the temperate regions.

Yams.—Properly speaking the name "yam" is confined to various species of *Dioscorea*, but it is also applied to the tannia, eddoe and other species. In Ceylon, for example, the term yam is used to cover all tubers.

Yams are a staple foodstuff in many parts of the West African Dependencies and in certain of the West Indian Colonies. In the southern part of Nigeria yams, with maize, are the principal foodstuffs. In the southern part of the Gold Coast yams and plantains are the staple articles of diet. They are also grown in most of the West Indies, being an important foodstuff in Barbados. To a lesser extent they are also grown in Ceylon, parts of Malaya, and the Dependencies in the Western Pacific. There are a number of varieties, and certain countries confine themselves to the production mainly of a small number of types.

The **Sweet Potato** (*Ipomaea Batatas*) is a trailing herbaceous plant with large tubers, probably of South American origin. It is known by various native names including *kumala* in Fiji. It is grown throughout the tropical parts of the Colonial Empire. On the whole it is possibly of less importance than the yam, but in certain parts, such as the Buganda Province of Uganda, it is one of the two staple foodstuffs. In Barbados also it is an important crop.

Cassava, Tapioca, and Manioc are the names given to two species of *Manihot*, "bitter cassava" (*Manihot utilissima*) and "sweet cassava" (*Manihot palmata* var. *Aipi*). Both species are grown widely in East and West Africa, Ceylon, Malaya, Mauritius, and certain of the West Indies and the Dependencies in the Western Pacific. In fact, the cassava, which is a native of South America, is now to be found throughout the tropical regions. The dried meal, prepared from the grated root, keeps for long periods and is often important as a food during the dry season. The roots of the sweet cassava can be eaten raw or cooked as a table vegetable, but those of the

* See page 566.

† See page 566.

bitter cassava cannot be eaten in an uncooked state. Both the sweet and the bitter cassava contain a glucoside which develops hydrocyanic or prussic acid. In the sweet cassava this glucoside is confined almost entirely to the skin of the root but in the bitter kind it is more or less evenly distributed throughout the roots. The poisonous principle is, however, dissipated by heat; the bitter cassava may be eaten if roasted but is not so pleasant to the taste as the sweet cassava.

The starch prepared from the root of the cassava, when agglomerated into pellets on hot plates, forms the pearl tapioca of commerce. Tapioca or cassava flake flour and meal are other products prepared from this plant.

There is a fairly large trade in these products in Malaya. In 1933, 2,726 tons of tapioca flour valued at £23,420 and 2,807 tons of tapioca pearl valued at £22,814 were imported and the following were exported:—

			Tons.	£
Tapioca flake	...	...	9,879	91,746
„ flour	...	...	2,010	17,571
„ pearl	...	...	20,031	176,302
				£285,619

After allowing for imports therefore the value of domestic exports was substantially in excess of £200,000.

Small quantities of cassava products, including cassava cakes, are also exported from certain other Dependencies, and production of cassava flour has recently been introduced into British Honduras.

Sago may conveniently be classed with tapioca, as the two products are similar and to a large extent interchangeable, but is actually an arboreal product. It is a starch prepared from the pith of the stems of several palms, in particular the “sago palm” (*Metroxylon Rumphii* and *laeve*), which is extracted by cutting down the palm, cutting the stems into logs for the removal of the bark and then grinding up the pith so that the starch may be separated in the washing machines. As in the case of tapioca the two principal products are “flour” and “pearl.” The only sources of supply are Malaya, the Dependencies in Borneo and the Netherlands East Indies. A small area (390 acres) is under this palm in the Straits Settlements, 80,000 acres in Sarawak, 14,000 acres in North Borneo and unknown, but substantial, areas in the rest of Malaya and Brunei.

Exports in 1933 were:—

			Tons.	£
Sarawak	...	...	24,299	88,048
North Borneo	...	...	1,671	2,790
Brunei	...	...	303	528

The trade in Malaya is largely an entrepôt one. Imports in 1933 were 4,469 tons of raw sago, valued at £7,410, and 56,228 tons of sago flour (of which about 24,000 tons came from the Dependencies in Borneo), valued at £208,973, while exports were 63,511 tons of sago flour, valued at £292,134, and 2,647 tons of sago pearl, valued at £23,718. From these figures it appears that the production for export of Malaya itself is between 5,000 and 10,000 tons annually.

Another tuber used for the manufacture of starch products is **Arrowroot** (*Maranta arundinacea*). Almost the whole world supply comes from St. Vincent, of which Colony arrowroot is the principal export. Particulars of production will be found in the memorandum* on the Colony in Part I. Exports in 1933 were valued at £55,510, about 50 per cent. of total domestic exports.

Canna edulis is also grown to a small extent in certain Dependencies for the tubers and for the production of starch. There is no export trade at present in this commodity which is known as “Queensland arrowroot.”

Potatoes are grown in several Dependencies including Kenya, Tanganyika Territory, Nyasaland, Nigeria, St. Helena, Mauritius, Cyprus, Malta, Bermuda, and Jamaica. A small export trade has been built up between Kenya and India and there is an old-established export trade from Cyprus and Malta.

Exports from Cyprus in 1933 amounted to 11,311 tons valued at £46,607, just over 5 per cent. of all domestic exports. In Malta, potatoes are the principal export, the quantity exported in 1933 being 10,170 tons valued at £79,368, nearly 60 per cent. of all domestic exports.

Other vegetables falling in this class which are mentioned in the memoranda in Part I are:—

Babai (*Colocasia indica*):—Gilbert and Ellice Islands.

Panna:—Solomon Islands.

Eddoe, Taro, or Coco yam (*Colocasia esculenta*) a herbaceous plant of the arum family with large spherical rootstocks or corms:—Barbados, Fiji, Gilbert and Ellice Islands, and West Africa.

Tannias (*Xanthosoma sagittifolium*) are rootstocks or corms similar to coco yams and are often confused with them. They are usually of larger size and form an important secondary foodstuff in the West Indies especially in British Guiana.

Other Vegetables.—The most important class in this group comprises the **pulses** which are an important native foodstuff, particularly in East Africa, and are grown in many other Dependencies. A number of members of this class are mentioned specifically in the various memoranda in Part I. Cowpeas, pigeon peas or dhall, Dolichos, Lima, French, and other beans, grams, and peas constitute the more important of the pulse crops grown in the Colonial Empire and in a few cases small occasional exports are made.

Tomatoes are of importance as a significant export crop in certain West Indian Islands. The principal market was formerly in the United States of America, but this trade was almost wiped

* See page 413.

out in 1930 by a heavy increase in the import duty, and since then the principal market has been in Canada. With the assistance of a preference of 2 cents per lb. granted as a result of the Ottawa Agreement it is hoped that the trade may be developed. Fortunately owing to variations in climatic conditions the crops from the various Colonies come on the market in Canada in succession and all except the Bermuda crop are over before the Canadian crop is ripe.

The following table shows imports of tomatoes into Canada during the 1932-33 season. It can be taken that it includes almost all the tomato exports of the West Indies:—

Month.		Bahamas. lb.	Bermuda. lb.	Windward and Leeward Is. lb.	Foreign. lb.
1932—					
November	... ..	277,000	—	9,000	770,000
December	... ..	1,406,800	—	26,000	147,100
1933—					
January	... ..	2,295,000	—	62,000	41,700
February	... ..	1,236,000	—	131,000	47,600
March	... ..	670,000	—	151,000	2,449,000
April	... ..	50,000	—	64,000	2,972,000
May	... ..	8,000	5,500	25,000	5,602,000
June	... ..	—	650,000	2,000	5,207,000
Total	... ..	5,942,800	655,500	470,000	17,236,400

The total value of exports in the year 1933 was as follows:—

	£
Bahamas	26,451
Bermuda (including other vegetables)	23,191
Montserrat	1,145
St. Kitts-Nevis	221
Grenada	1
St. Vincent	250
	<u>£51,259</u>

Owing to the inclusion of other vegetables in the Bermuda figure the true value is probably £2,000 or £3,000 less.

Onions are grown as an export crop in Bermuda and certain of the West Indian Colonies. There is also an appreciable export from Malta—the value of exports amounting to £2,360 in 1933.

A wide range of fresh vegetables of European type is grown in a number of Dependencies where the climate is temperate, for example Bermuda and the highlands of East Africa, Ceylon, and Malaya. Bermuda has a useful export trade with Canada in early vegetables and grows cabbages, celery, lettuce, etc., for the early markets of the Dominion. Further, by the use of acclimatized seed, an extension of growing European vegetables has also taken place in recent years under tropical conditions. Peas, beans, cauliflowers, cabbages, carrots, beet, onions, etc., are all now being commonly grown for local consumption.

MISCELLANEOUS PRODUCTS.

Under this head are assembled a number of brief memoranda on commodities which do not fall under any of the other heads in this series of memoranda and are not sufficiently important to justify fuller treatment.

Areca-nuts, also called **Betel-nuts**, are the fruit of the areca or betel palm (*Areca Catechu*). The nuts are gathered when they are ripe or nearly ripe and in order to be prepared for consumption have to be boiled, sliced, and dried. Their principal use is for chewing, and there is a very large demand in India for this purpose. The demand is satisfied partly by local production, but also by very large imports from Ceylon, Malaya, and the Netherlands East Indies (the last partly direct and partly *via* Malaya).

There is also some importation into other countries with Indian populations.

Betel-nuts also yield a dye-stuff known as *Bombay catechu*, which is extracted from the nut by boiling.

About 69,000 acres are under the areca palm in Ceylon. An unknown quantity of the nuts is consumed locally and substantial quantities are exported, chiefly to India. In 1929, a year when exports were unusually large, 7,200 tons, valued at £202,000, were exported. In 1933, the quantity was just over 5,000 tons valued at £96,000.

The total area under areca-nuts in Malaya is estimated to be not less than 26,250 acres. The main areas of production are Johore and the east coast. Total production and local consumption are unknown, though the latter is certainly substantial. There is a very large entrepôt trade which makes it impossible to state domestic exports accurately, but they appear to be about 20,000 tons annually, worth on the basis of 1933 average values about £185,000.

There is also a small production of areca-nuts in Tanganyika Territory and Zanzibar.

Beeswax so far as the Colonial Empire is concerned is predominantly a forest product, not a by-product of the bee-keeping industry.

Large quantities of wax from wild bees' nests are collected in East Africa, particularly Tanganyika Territory, and the combined exports from that Dependency, Kenya, Uganda, and Nyasaland in recent years have been as follows:—

		Cwt.	£			Cwt.	£
1930	... ..	4,355	23,155	1932	... ..	9,040	37,047
1931	... ..	13,468	52,620	1933	... ..	9,015	37,248

Larger quantities would no doubt be forthcoming if sufficient inducement is offered.

There are also small exports from the Gambia, the Dependencies in Borneo, Jamaica, and Palestine, in the last two cases as by-products of bee-keeping.

Bitters are highly concentrated alcoholic liquors used in very small quantities for flavouring beverages. The best known member of the group is *Angostura bitters*, for which valuable medicinal and tonic properties are claimed. These are manufactured according to a secret recipe by a British private company in Trinidad, to which Colony the manufacture was transferred in 1875 from Angostura, now Ciudad Bolivar, in Venezuela. Until 1929 the annual value of exports normally amounted to between £70,000 and £90,000. Exports during recent years have been as follows:—

			Gallons.	£				Gallons.	£
1930	...	...	22,698	38,065	1932	...	...	10,564	18,962
1931	...	...	15,700	27,288	1933	...	...	11,850	21,115

Bird's egg yolk derived from the eggs of the sooty tern has recently become an export commodity in the Seychelles. The eggs are collected in some of the outlying islands. Exports in 1933 amounted to 56 tons valued at £670.

Bird's nests (the edible nests of a particular variety of swift which constructs its nest exclusively of saliva) are collected in limestone caves in North Borneo for export to China.

The **Carob** or **Locust Bean** is the fruit of an evergreen tree (*Ceratonia Siliqua*) which grows abundantly in Cyprus, Palestine, and various other Mediterranean countries; it has been introduced into South Africa, Australia, India and elsewhere.

The beans are gathered when ripe and are crushed either whole or after removal of the hard seeds to form an ingredient in cattle cake, their value lying chiefly in their sugar content which makes the cake palatable and nourishing.

The seeds are employed as a source of "Tragasol" and similar mucilaginous substances employed in the textile industry and toilet preparations.

The bean also yields a syrup which is used in the Levant in the preparation of sweetmeats.

Until 1928 whole beans only were exported but in that year two crushing mills were erected in Cyprus.

For many years carobs have been the most important agricultural export and one of the three largest items in the export trade in Cyprus. During the last ten years the value of exports of carobs has varied between about £120,000 and £305,000 and the percentage of total domestic exports represented by carobs between about 10 and nearly 22 per cent.

Cascarilla bark, the dried bark of *Croton Eluteria*, is a minor forest product of some importance in the Bahamas, the annual value of exports during recent years having varied between £900 and £3,500. It is used as a flavouring for tobacco and in medicine.

Cinchona bark, from which quinine is manufactured, has been grown experimentally in Tanganyika Territory and there is some prospect of its development.

Dyeing Materials.—Certain of the raw materials from which natural dye-stuffs are extracted are produced in the Colonial Empire. The most important of these are **logwood** and **fustic** to which reference is made under the head of Timbers. **Areca-nuts** (see above) are the source of **Bombay catechu**, and **camwood**, another of the dye-woods, is produced in parts of West Africa. Certain of the tanning materials mentioned below can also be used as dyes.

Flowers of course grow in profusion in many Dependencies. The only flower, however, in which there is any export trade in the fresh state is the bulb of the Easter lily (*Lilium longiflorum Harrisii*), of which 1,507 cases valued at £4,910 were exported from Bermuda in 1933. (See also pyrethrum below under Insecticides.)

Honey is a minor Colonial product. There are small bee-keeping industries in Mauritius, Cyprus, Palestine, British Honduras, and various West Indian Colonies. The only Colony with a substantial trade is Jamaica, the exports during recent years sometimes reaching nearly 1,000 tons, valued at between £10,000 and £20,000. Palestine exports from 20 to 25 tons annually, valued at between £1,200 and £1,700.

Insecticides.

Pyrethrum is a plant the flowers of which yield a valuable insecticide. Some 85 per cent. of the world's Pyrethrum is consumed in the United States of America, and its chief use is in domestic fly sprays. It is also used in agricultural and livestock sprays and dusts, for which purposes it compares favourably with the other insecticides. Supplies formerly came entirely from foreign countries, but the crop has been established in Kenya where it has developed rapidly, and a surplus is now available for export. The Kenya Pyrethrum is of greater strength than Japanese, the main source of supply, its Pyrethrin content being about 50 per cent. higher. Exports from Kenya in 1934 were about 60 tons and about 300 tons are expected to be exported in 1935.

Derris or **Tuba Root** is grown in Malaya, Sarawak and North Borneo, and the Netherlands East Indies where it has long been in use as a fish poison. It contains a substance called Rotenone, which is an effective insecticide but not harmful to human beings. It is cultivated by the natives and also as a secondary crop in rubber and other plantations. The total world exports amount to about 700 tons per annum of which Malaya produces approximately 70 per cent., the principal source of supply being Johore, where some 3,800 acres were under this crop in 1931. The United Kingdom, United States of America and Japan are the principal consuming countries. Net exports from Malaya in 1933 amounted to 13,402 cwt. valued at about £31,000.

Other Plants.—Many other different kinds of plants have been used as fish poisons in various parts of the world, and several of them may also be employed as insecticides. The most important at present so used is *Cubé* of which there is no commercial production in the Colonial Empire. Experiments are being made in British Guiana with *Lonchocarpus densiflorus* (locally known as *Haiari*), but there is at present no commercial production from this source. The active constituent of this plant is Rotenone as in the case of Derris.

Tephrosia Vogellii, which occurs in the wild state in many of the tropical African Colonies, has been proved to have important insecticidal properties and commercial developments may follow, as the plant can be easily cultivated.

Ivory.—The elephant is carefully preserved in the East and West African Dependencies, hunting being allowed only under licence, and every effort being made to prevent poaching and the taking of immature ivory.

There is a small but steady export trade in ivory. Domestic exports in 1933 were as follows:—

		Cwt.	£
Kenya and Uganda	... ..	840	21,579
Tanganyika Territory	... ..	467	13,753
Nyasaland	... ..	26	1,304
Gold Coast	... ..	11	430
Nigeria	... ..	1	18
Sierra Leone	... ..	1	27
		1,346	£37,111

Ivory-nuts or **Vegetable ivory** are the nuts of several palms. The most important palm of this class which grows in the Colonial Empire is the *Coccoloccus Salomensis*, a palm closely related to the sago palm and found in the Solomon Islands. It is self-planted and is found in almost every swamp in the Protectorate. It takes from 10 to 14 years to come to maturity and having borne one crop of fruit, which drops to the ground when ripe, gradually rots away and dies. The fruit is collected when it falls to the ground and is sold to traders who export it principally to Australia from which the greater part is re-exported. The nut when mature is of a hard ivory-like character and is used extensively for making buttons and similar objects.

The quantities exported from the Solomon Islands vary between 700 and 1,500 tons annually and the value between about £5,600 and £13,600.

Species of *Hyphoene*, which yield the well known Dom palm nut, occur in some of the African Colonies, but so far the nuts have not been collected there commercially.

Kola-nuts, also known as Bissy and Guru, are the large, fleshy seeds of *Cola acuminata*, a West African tree closely related to the cocoa tree. Kola-nuts possess stimulating and sustaining properties mainly due to the presence of the alkaloid caffeine. For this reason they are used, chiefly as a masticatory, by the natives throughout the great triangular area bounded by Gambia and the Congo on the west and Abyssinia on the east. In Europe and the United States of America kola seeds are used medicinally and in various food preparations.

In the Gold Coast the industry is based on wild trees. The crop is mainly exported, either over the land frontiers to French territory or by sea to British and French West African ports. In 1933, export duty at the land frontier posts was paid on 3,057 tons valued at £71,272, but probably more actually crossed the frontiers. Exports by sea only amounted to 249 tons.

In Nigeria the kola tree has been planted extensively in recent years and it is estimated that in 1933 total production was about 11,100 tons, of which 121 tons valued at £2,406 were exported. In addition 875 tons were imported.

In Sierra Leone production is both from wild and from semi-cultivated trees. Production is in excess of local requirements and very substantial exports have been made in the past to neighbouring territories both British and foreign. Exports are diminishing owing to production in those territories, but in 1933 still amounted to over 1,810 tons valued at £43,656.

There is also a small production of kola-nuts in, and export from, Jamaica and the Windward Islands.

Rhinoceros horn is exported in small quantities from the East African Dependencies. Exports in 1933 were as follows:—

		Cwt.	£			Cwt.	£
Kenya and Uganda	... ..	6	676	Tanganyika Territory	... ..	22	1,829

The high value is due to the fact that in China, to which almost all the exports find their way, the horn has a high reputation as an aphrodisiac.

Silk.—The production of mulberry silk has long been established as an industry in Cyprus and a modern filature which has produced silk of the highest quality was established in 1926. Unfortunately, owing to the heavy fall in the market price of silk, the filature is now closed. There is, however, a small local production of silk, and figures for the last five years are as follows:—

Year.						Quantity in cwt.	Value in £.
1929	... ..	...	...	...	...	226	26,066
1930	... ..	...	...	...	...	151	17,476
1931	... ..	...	...	...	...	41	2,395
1932	... ..	...	...	...	...	142	8,130
1933	... ..	...	...	...	...	107	4,852

Attempts made to establish silk production in other Colonies have so far proved unsuccessful, the decline in silk prices being a factor in the situation. Experiments with the Eri silkworm (*Attacus ricini*), introduced from India, which feeds on the castor oil plant are being carried out in the Gold Coast and Seychelles with a view to local weaving industries. This silkworm is also well known in Ceylon.

Strophanthus is the name of a genus of plants several species of which grow in East Africa, the most important being *S. hispidus* and *S. Kombe*.

The principal use of these plants used to be to provide the natives with arrow poison, which was extracted from the pounded seeds.

The seeds also have medicinal uses and are now grown for this purpose in Nyasaland, from which Protectorate there were exports of about 156 cwt. valued at £2,628 in 1933.

Tanning materials.—Tannin, the active substance utilized in tanning leather is contained in varying degrees of concentration in the bark, wood, leaves, fruits and tubers of certain trees and plants.

A number of these trees and plants are found in the Colonial Empire, and there is some export of their products. Where the concentration of tannin is a high one, as in the case of certain barks and leaves, the natural product itself is exported. In other cases the product is treated locally in order to produce an extract giving a high degree of concentration. The following are the most important of these products:—

Cutch is a name applied to solid tanning extracts from several sources. In its proper and original sense it was used to designate a solid product derived from the heartwood of *Acacia Catechu*, produced in India and Burma, but the word is now more commonly used in the United Kingdom to designate the extract prepared from mangrove bark.

Mangrove cutch is the third most important product of Brunei, the exports of this substance in 1933 being 1,788 tons valued at £14,438 or about 6 per cent. of all exports. Cutch is also exported from Sarawak (exports in 1933, 2,764 tons valued at £46,171) and in small quantities from North Borneo.

Gambier is a solid extract prepared from the leafy twigs of *Uncaria Gambier* a climbing shrub cultivated in Malaya and the Malay Archipelago. Of gambier, round and block, Malaya is a net importer, but the quantities involved are very small. Net exports of gambier cube, however, are substantial, amounting to about 2,220 tons valued at about £34,000 in 1933.

Mangrove bark is the bark of a number of trees of the natural order of *Rhizophoraceae* and all called indiscriminately "mangrove" although their scientific names differ widely.

These trees grow in many parts of the Colonial Empire and the tannin content of their barks varies widely not only between different species of trees, but also between the same tree in different localities. Where the tannin content is low, as in Brunei and Sarawak, the extract is prepared on the spot. In other cases the bark itself is exported.

Exports from East Africa in 1933 were as follows:—

	Tons.	£		Tons.	£
Kenya and Uganda ...	47	211	Tanganyika Territory ...	3,115	8,615

There are also occasional small exports from British Guiana.

From West Africa there were no exports though there are very large areas under mangrove.

There is a very large entrepôt trade in Malaya, but imports exceed exports by 2,000 to 3,000 tons annually.

Sumach is derived from the *Rhus Coriaria*, a native of the Mediterranean countries. The principal source of supply is Sicily and the only producer in the Colonial Empire is Cyprus, from which the leaves are exported in ground form. Modern machinery has been installed and a commodity of high quality is now being produced. Exports during 1933 were 12,005 cwt. valued at £7,412.

Wattle bark, one of the most valuable and widely used tanning materials of the British Empire, is the bark of the black wattle (*Acacia mollissima*), a tree of Australian origin introduced into various other countries of which the most important in the Colonial Empire are Kenya and Tanganyika Territory.

In Kenya the area under wattle on European estates in 1932-33 was over 14,500 acres, and it is believed that there was an even larger area in the Native Reserves.

Exports of the bark are now substantial and there are good prospects of a further development of the trade. In 1933, they amounted to 10,804 tons valued at £46,614. In addition, 1,438 tons of wattle bark extract valued at £20,150 were exported. There are two factories in the Colony for the preparation of wattle extract, the second having been opened in 1934.

There have been no exports from Tanganyika Territory since 1931 when 101 tons valued at £471 were exported.

The wattle is also grown in Ceylon, but there is at present no export of the bark.

Further particulars of these materials will be found in the pamphlet "Tanning Materials of the British Empire," published by the Imperial Institute in 1929.

Wine, Brandy, and other grape spirits.—Few Dependencies of the Colonial Empire are climatically suitable for wine-growing and production of wine is in practice confined to Cyprus, Malta, and Palestine.

In Cyprus, wines have been made for centuries, but until recently production was almost solely for domestic consumption and the quality of the wine produced was not high. Steps have now, however, been taken to put the industry on a better footing and exports in 1932 were nearly 1½ million gallons valued at over £70,000. In 1933 the quantity fell to about 1,135,000 gallons valued at about £50,000. Exports of brandy are still less than 1,000 gallons annually.

In Malta, where there is an old-established wine industry, the whole production, which in 1933 was estimated at nearly three-quarters of a million gallons, is consumed locally.

In Palestine the industry was established comparatively recently by Jewish enterprise. There is some production both for local consumption and for export; in 1932 production of wine was nearly 700,000 gallons, and exports a little over 300,000 gallons, valued at a little over £30,000. In 1933 production decreased by almost half to 360,000 gallons, exports being a little over 207,000 gallons valued at a little over £22,000. Production of spirits was over 185,000 gallons.

TABLE I

EXPORTS OF HIDES AND SKINS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA— (Hides)	1930	cwt.	27,992	1,166	38,401	67,559	68,226	2,683	93,221	164,130
	1931	"	24,468	553	29,626	54,647	44,620	1,002	54,428	100,050
	1932	"	27,147	524	41,057	68,728	48,097	943	65,709	114,749
	1933	"	27,506	531	77,021	105,058	40,703	660	110,936	152,299
(Skins)	1930	No.	773,890	6,320	1,143,149	1,923,359	30,487	268	50,418	81,173
	1931	"	433,935	13,872	618,996	1,066,803	17,023	570	33,779	51,372
	1932	"	321,146	74,218	308,288	703,652	10,093	2,111	24,479	36,683
	1933	"	442,878	102,221	502,702	1,047,801	10,378	1,790	17,220	29,388
TANGANYIKA TERRITORY	1930	cwt.	7,860	24,800	9,255	41,915	32,289	69,309	25,021	126,619
	1931	"	8,250	22,907	11,140	42,297	18,861	42,023	25,074	85,958
	1932	"	9,740	22,540	22,160	54,440	20,066	31,318	49,253	100,637
	1933	"	9,800	24,440	48,560	82,800	19,355	39,602	106,425	165,382
NORTHERN RHODESIA ...	1930						4,434	8,653	62	13,149
	1931						2,947	16,652	30	19,629
	1932						3,770	4,572	44	8,386
	1933						4,226	4,165	44	8,435
SOMALILAND*	1930									92,577
	1931									72,220
	1932									46,889
	1933									81,000
EAST AFRICA—TOTALS (in- cluding Nyasaland and Zanzibar).	1930	cwt.	36,548	28,297	48,602	113,518	135,843	80,958	172,265	481,643
		No.	773,890	6,320	1,168,629	2,758,970				
	1931	cwt.	33,064	30,457	41,301	104,869	84,492	60,271	114,561	331,544
		No.	448,365	13,872	653,096	2,112,554				
	1932	cwt.	38,130	25,086	64,008	127,224	82,093	38,965	141,098	309,045
		No.	325,472	74,218	327,478	1,806,964				
	1933	cwt.	37,318	26,965	126,579	190,862	74,738	46,258	236,420	438,416
		No.	444,878	104,321	523,762	2,788,711				
NIGERIA	1930	cwt.	41,102	20	55,952	97,074	428,786	66	448,478	877,330
	1931	"	41,853	21	67,629	109,503	354,849	225	379,990	735,064
	1932	"	31,796	12	63,634	95,442	224,387	23	434,438	658,848
	1933	"	41,082	—	79,941	121,023	187,326	—	437,351	624,677
WEST AFRICA — TOTALS (in- cluding Gold Coast, Sierra Leone and Gambia).	1930	cwt.	41,806	111	62,148	104,065	430,814	628	470,136	901,678
	1931	"	42,550	77	71,095	113,722	356,479	579	386,338	743,396
	1932	"	32,373	69	65,800	98,242	225,615	366	437,886	663,867
	1933	"	41,835	66	103,806	145,707	194,819	349	445,343	640,511
CEYLON	1930	cwt.	235	15,512	30	15,777	2,801	65,897	583	69,281
	1931	"	46	14,855	2	14,903	1,549	37,211	49	38,809
	1932	"	108	12,749	3	12,860	2,859	28,849	20	31,728
	1933	"	34	11,944	23	12,001	477	21,664	314	22,355
MALAYA†	1930	cwt.	18,420	24,290	11,527	54,237	45,502	103,874	55,297	204,673
	1931	"	12,140	19,699	8,527	40,366	28,184	67,048	26,624	121,856
	1932	"	7,583	14,606	13,149	35,338	19,729	51,236	35,343	106,308
	1933	"	16,897	7,171	15,309	39,377	40,894	17,146	60,399	118,439
DEPENDENCIES IN BORNEO*†	1930	cwt.				3,804				8,780
	1931	"				3,159				4,475
	1932	"				4,513				5,340
	1933	"				3,199				13,152
CYPRUS	1930	cwt.		—	2,065	2,065	115	—	12,690	12,805
	1931	"	15	11	2,237	2,263	149	15	12,494	12,658
	1932	"		19	1,944	1,963	2	77	8,840	8,919
	1933	"	236	380	3,199	3,815	975	797	13,054	14,826
MALTA	1930	cwt.	134	—	8,496	8,630	430	—	21,513	21,943
	1931	"	195	—	6,691	6,886	445	—	15,255	15,700
	1932	"	56	—	7,974	8,030	90	—	13,188	13,278
	1933	"	18	—	7,886	7,904	103	—	13,307	13,410
PALESTINE	1930	cwt.	123	—	8,256	8,379	1,637	—	26,514	28,151
	1931	"	16	3	10,952	10,971	236	10	22,535	22,781
	1932	"	82	—	7,935	8,017	2,296	—	12,045	14,341
	1933	"	69	—	9,471	9,540	1,569	—	13,296	14,865

TABLE I.—continued.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
JAMAICA	1930	No.	8,936	7,032	211,533	227,501	5,882	4,671	22,736	33,289
	1931	"	6,529	3,000	194,751	204,280	2,961	1,594	20,419	24,974
	1932	"	5,110	—	177,783	182,893	2,204	—	13,979	16,183
	1933	"	12,838	2,525	192,036	207,399	5,466	1,335	14,436	21,237
OTHER BRITISH WEST INDIES (including Bahamas, Barbados, Bermuda, British Guiana, British Honduras, Trinidad, the Turks and Caicos, Cayman, Leeward and Windward Islands).	1930	cwt.	12	291	12	315	7,352	3,322	12,048	22,722
		No.	11,225	6,838	15,893	33,956				
	1931	cwt.	—	278	47	325	2,984	1,537	9,013	13,534
		No.	6,145	3,395	16,712	26,252				
	1932	cwt.	—	199	—	199	1,678	482	5,856	8,016
		No.	5,668	5,380	17,172	28,220				
	1933	cwt.	—	163	—	163	7,151	676	7,072	14,899
		No.	14,016	4,347	20,977	39,340				
WEST INDIES AND AMERICA— TOTALS.	1930	cwt.	12	291	12	315	13,234	7,993	34,784	56,011
		No.	20,161	13,870	227,456	261,487				
	1931	cwt.	—	278	47	325	5,945	3,131	29,432	38,506
		No.	12,674	6,395	211,463	230,532				
	1932	cwt.	—	199	—	199	3,882	482	19,835	24,199
		No.	10,778	5,380	194,955	211,113				
	1933	cwt.	2	163	2	167	12,617	2,001	21,508	36,136
		No.	26,854	6,872	213,013	246,739				
FALKLAND ISLANDS AND DEPENDENCIES.	1930						14,704	—	—	14,704
	1931						8,881	—	60	8,941
	1932						4,921	—	198	5,119
	1933						8,626	—	196	8,822
FIJI AND THE WESTERN PACIFIC TERRITORIES (New Hebrides and Tonga).	1930						—	4,284	—	4,284
	1931						106	2,242	—	2,697
	1932						129	1,702	—	1,966
	1933						23	1,451	—	1,646
GRAND TOTALS—(includ- ing Mauritius, Seychelles and St. Helena).	1930									1,804,563
	1931									1,344,268
	1932									1,184,914
	1933									1,323,137

Generally speaking the unit of measurement is hundredweights for hides and numbers for skins. The two units shown in the area totals are supplementary and not alternative, the total quantity exported being the sum of both. Total quantities for the whole Colonial Empire are not available, since value only is given in the trade returns of certain Colonies.

* Particulars of destination not available.

† Includes re-exports, the domestic exports not being shown separately in the trade returns.

‡ Includes horns, etc., separate figures for hides and skins only not being available in the cases of Brunei and Sarawak.

TABLE II.

WORLD EXPORTS OF COCOA BEANS IN METRIC TONS BY CROP-YEARS 1926-27 to 1933-34.

(FIGURES FOR THE PERIOD 1926-27 TO 1932-33 WERE EXTRACTED FROM "GORDIAN," 10TH NOVEMBER, 1933, PAGE 19, THOSE FOR 1933-34 WERE SUPPLIED BY THE INTERNATIONAL INSTITUTE OF AGRICULTURE, ROME).

<i>Countries of Production.</i>	1933-34.	1932-33.	1931-32.	1930-31.	1929-30.	1928-29.	1927-28.	1926-27.
GOLD COAST	224,400	254,500	209,900	220,600	230,200	244,700	204,500	236,500
BRAZIL	95,900	101,900	98,700	66,400	73,700	66,000	68,400	77,800
NIGERIA	72,200	69,800	66,200	49,500	52,600	50,100	42,800	43,200
IVORY COAST	35,700	31,600	24,800	19,700	22,200	16,700	13,000	9,000
TRINIDAD	13,200	23,200	18,000	27,900	24,800	26,600	27,300	21,200
DOMINICAN REPUBLIC ...	22,600	19,800	16,300	27,500	19,400	24,400	16,300	27,000
ECUADOR	16,900	10,200	16,200	15,000	17,700	15,800	21,300	20,600
ALL OTHERS	73,200	94,200	92,000	97,900	93,900	96,900	91,200	85,000
TOTAL	554,100	605,200	532,100	524,500	534,500	537,200	484,800	521,300

TABLE III.

WORLD CONSUMPTION OF COCOA BEANS IN METRIC TONS BY CROP-YEARS 1926-27 to 1932-33.

(EXTRACTED FROM "GORDIAN," 10TH NOVEMBER, 1933, PAGE 19.)

<i>Countries of Consumption.</i>	1932-33.	1931-32.	1930-31.	1929-30.	1928-29.	1927-28.	1926-27.
UNITED STATES OF AMERICA*	190,000	185,000	190,000	190,000	185,000	180,000	175,000
GERMANY*	77,000	77,000	81,000	72,000	80,000	74,000	74,000
GREAT BRITAIN*	67,500	67,800	59,300	56,200	57,500	56,500	58,400
NETHERLANDS*	45,000	45,000	52,000	51,000	50,000	45,000	40,000
FRANCE*	42,900	41,400	41,500	35,200	35,800	33,400	22,800
CANADA	9,700	8,400	8,300	8,900	9,300	9,000	7,700
SWITZERLAND	7,600	5,100	10,800	7,400	9,100	8,300	7,000
ITALY	7,600	6,800	7,500	6,800	7,700	7,800	5,900
BELGIUM	6,200	9,100	11,200	6,500	7,800	6,200	5,500
OTHER COUNTRIES	67,600	72,700	71,800	67,600	65,900	61,500	58,900
TOTAL	521,100	518,300	533,400	501,600	508,100	481,700	455,200

NOTE.—In this table the figures for the countries marked * are partly estimated or adjusted while those for the remaining countries are imports only, without adjustment. The figures are considered to be the most accurate estimate possible of "true consumption." The figures for the season 1933-34 are not yet available but there is every indication that consumption has greatly increased.

TABLE IV.
EXPORTS OF RAW COCOA FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
GOLD COAST	1930	42,486	2,016	146,078	190,580	1,527,793	69,249	5,373,343	6,970,385
	1931	56,065	3,501	184,531	244,097	1,310,617	82,810	4,099,738	5,493,165
	1932	56,300	4,090	173,355	233,745	1,388,730	97,180	4,025,450	5,511,360
	1933	49,737	6,627	179,753	236,117	1,047,203	132,953	3,791,322	4,971,478
NIGERIA	1930	11,921	—	40,410	52,331	368,013	—	1,388,387	1,756,400
	1931	11,952	—	40,854	52,806	251,768	—	841,486	1,093,254
	1932	14,664	—	56,371	71,035	301,742	—	1,159,709	1,461,451
	1933	17,819	—	42,918	60,737	353,337	—	790,290	1,143,627
WEST AFRICA—TOTALS (including Sierra Leone).	1930	54,476	2,016	186,499	242,991	1,898,034	69,249	6,762,050	8,729,333
	1931	68,019	3,501	225,444	296,964	1,562,408	82,810	4,942,235	6,587,453
	1932	71,015	4,090	229,756	304,861	1,691,279	97,180	5,185,647	6,974,106
	1933	67,590	6,627	222,704	296,921	1,401,042	132,953	4,582,100	6,116,095
CEYLON	1930	696	547	2,618	3,861	40,843	31,414	148,002	220,259
	1931	496	489	2,849	3,834	23,119	22,113	128,759	173,991
	1932	861	716	2,549	4,126	33,354	29,345	101,728	164,427
	1933	417	481	2,353	3,251	14,176	17,087	84,577	115,840
JAMAICA	1930	204	1,085	1,740	3,029	5,496	29,145	46,682	81,323
	1931	151	1,647	847	2,645	2,915	31,773	16,299	50,987
	1932	35	1,883	270	2,188	766	41,895	5,441	48,102
	1933	27	1,618	26	1,671	534	31,395	506	32,435
TRINIDAD AND TOBAGO ...	1930	1,754	2,368	19,907	24,029	90,660	115,724	929,672	1,136,056
	1931	2,097	1,576	21,857	25,530	76,934	54,003	695,396	826,333
	1932	2,151	2,187	14,333	18,671	74,609	64,523	440,038	579,170
	1933	2,514	3,981	16,413	22,908	68,916	100,728	386,263	555,907
GRENADA	1930	1,915	1,102	1,226	4,243	88,186	49,732	54,625	192,543
	1931	2,820	525	1,038	4,383	103,228	16,812	33,883	153,923
	1932	1,982	1,512	898	4,392	45,072	35,384	20,775	101,231
	1933	1,693	2,389	485	4,567	42,868	53,437	10,230	106,535
WEST INDIA—TOTALS (including Leeward Islands, St. Lucia and St. Vincent).	1930	4,242	4,945	22,899	32,086	199,269	208,353	1,032,150	1,439,772
	1931	5,458	4,010	23,775	33,243	194,493	108,372	746,491	1,049,356
	1932	4,437	5,858	15,523	25,818	126,869	147,112	466,782	740,763
	1933	4,467	8,263	16,924	29,654	118,442	189,894	397,012	705,348
NEW HEBRIDES*	1930				2,265				73,444
	1931				1,505				31,435
	1932				1,728				27,967
	1933				1,893				28,745
GRAND TOTALS (including Kenya and Uganda, Tan- ganyika Territory and Fiji).	1930				281,216				10,463,307
	1931				335,558				7,842,572
	1932				336,542				7,907,581
	1933				331,728				6,966,377

* Particulars of destination not available.

TABLE V.
EXPORTS OF RAW COFFEE FROM THE COLONIAL EMPIRE

<i>Colony, etc.</i>	<i>Year.</i>	<i>Quantity in cwt. exported to</i>			<i>Total.</i>	<i>Value in £ exported to</i>			<i>Total.</i>
		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	
KENYA AND UGANDA ...	1930	301,787	33,403	23,751	358,944*	1,380,530	130,433	70,892	1,581,865*
	1931	227,922	32,384	55,585	315,893*	890,234	101,818	155,759	1,147,818*
	1932	246,519	62,781	53,683	362,993*	1,055,701	230,016	151,117	1,436,877*
	1933	179,331	95,932	82,258	357,658*	576,331	265,115	200,951	1,042,991*
TANGANYIKA TERRITORY ...	1930	46,100	180,780	4,060	230,940	121,636	265,620	9,773	397,029
	1931	24,180	159,680	1,160	185,020	57,426	186,685	2,892	247,003
	1932	27,760	195,520	3,940	227,220	69,664	383,365	10,521	463,550
	1933	32,060	216,240	6,060	254,360	70,797	341,104	17,605	429,506
EAST AFRICA—TOTALS (including Nyasaland and Northern Rhodesia).	1930	348,639	214,387	27,813	590,842*	1,504,624	396,759	80,670	1,982,063*
	1931	252,621	192,380	56,749	501,752*	948,913	289,269	158,660	1,396,849*
	1932	274,684	258,667	57,678	591,039*	1,126,356	614,235	161,766	1,902,400*
	1933	211,674	312,412	88,318	612,541*	647,717	606,778	218,557	1,473,646*
JAMAICA	1930	4,865	55,375	1,146	61,386	12,805	145,800	3,016	161,621
	1931	6,112	65,518	10,311	81,941	12,732	136,778	21,483	170,993
	1932	2,749	69,629	6,885	79,263	7,898	197,312	18,847	224,057
	1933	2,353	84,909	470	87,732	5,930	211,186	1,261	218,377
TRINIDAD	1930	61	3,906	414	4,381	158	11,330	987	12,475
	1931	33	5,217	2,371	7,621	67	10,417	5,596	16,080
	1932	4	7,717	390	8,111	11	19,672	1,139	20,822
	1933	4	2,890	208	3,102	9	7,202	577	7,788
WEST INDIES—TOTALS (including British Guiana, Leeward Islands and St. Lucia).	1930	5,988	59,641	3,421	69,050	14,452	157,704	6,606	178,762
	1931	6,194	71,400	19,078	96,672	12,852	147,911	33,284	194,047
	1932	2,753	80,521	13,497	96,789*	7,909	223,151	28,178	259,270*
	1933	2,365	92,606	6,068	101,057*	5,951	226,448	10,383	242,816*
GRAND TOTALS—(including Nigeria, Gold Coast, Sierra Leone, Ceylon, New Hebrides and Fiji).	1930	354,639	274,144	31,396	662,682*	1,519,115	554,747	87,571	2,160,335*
	1931	258,917	263,789	75,903	601,231*	961,959	437,201	192,069	1,596,948*
	1932	277,479	339,198	71,401	692,366*	1,134,325	837,415	190,308	2,168,694*
	1933	214,176	405,035	95,008	722,879*	653,926	833,275	230,068	1,731,206*

* Including exports for Ships' Stores.

TABLE VI.
EXPORTS OF RAW COTTON FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in centals of 100 lb. exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA (almost entirely Uganda).	1930	37,113	452,578	31,718	521,409	115,248	1,355,076	99,444	1,569,768
	1931	67,130	689,085	2,596	758,811	123,991	1,381,018	4,886	1,509,895
	1932	77,489	746,882	9,448	833,819	144,470	1,430,519	17,772	1,592,761
	1933	238,334	781,682	169,959	1,189,975	530,730	1,806,459	368,605	2,705,794
TANGANYIKA TERRITORY ...	1930	29,805	47,494	4,925	82,224	94,492	134,146	18,775	247,413
	1931	18,700	35,649	—	54,349	44,439	75,313	—	119,752
	1932	30,793	28,719	12,376	71,888	76,782	75,552	31,413	183,747
	1933	35,543	76,071	2,063	113,677	86,868	184,838	5,158	276,864
NYASALAND	1930	37,983	—	—	37,983	72,881	—	—	72,881
	1931	22,637	—	—	22,637	37,729	—	—	37,729
	1932	20,950	—	—	20,950	34,916	—	—	34,916
	1933	23,139	—	1,099	24,238	47,725	—	2,289	50,014
EAST AFRICA—TOTALS (including Northern Rhodesia).	1930	104,901	500,074	36,643	641,618	282,621	1,489,227	118,219	1,890,067
	1931	108,467	724,734	2,596	835,797	206,159	1,456,331	4,886	1,667,376
	1932	129,345	775,601	21,824	926,770	256,448	1,506,071	49,185	1,811,704
	1933	297,016	857,753	173,121	1,327,890	665,323	1,991,297	376,052	3,032,672
NIGERIA (Lint)	1930	168,262	—	11,124	179,386	601,996	—	21,562	623,558
	1931	66,047	—	12,690	78,737	127,116	—	25,696	152,812
	1932	24,574	—	2,102	26,676	47,408	—	4,055	51,463
	1933	93,797	—	4,834	98,631	183,739	—	9,250	192,989
WEST AFRICA—TOTALS (including Gambia and Gold Coast).	1930	168,297	—	13,486	181,783	602,054	—	23,341	625,395
	1931	66,047	—	14,692	80,739	127,116	—	26,670	153,786
	1932	24,574	8	3,707	28,289	47,408	6	4,618	52,032
	1933	93,797	—	5,671	99,468	183,738	—	9,639	193,378
CYPRUS	1930	3,549	—	11,260	14,809	11,760	—	24,704	36,464
	1931	239	—	15,841	16,080	468	—	32,650	33,118
	1932	2,315	—	9,541	11,856	4,399	1	20,718	25,118
	1933	56	—	4,847	4,903	100	1	11,623	11,724
WEST INDIES—TOTALS (including Bahamas, Barbados, Trinidad and the Leeward and Windward Islands).	1930	20,619	—	1,354	21,973	157,602	—	12,190	169,792
	1931	17,354	33	1,885	19,272	88,893	168	7,632	96,693
	1932	8,545	31	1,636	10,212	30,133	33	7,170	37,326
	1933	10,148	25	3,420	13,593	30,416	66	16,301	46,783
FIJI AND THE WESTERN PACIFIC TERRITORIES (New Hebrides).	1930				12,023				33,607
	1931				9,458				10,979
	1932				5,254				8,377
	1933				1,738				3,384
GRAND TOTALS—(including Ceylon, Malaya, North Borneo and Malta).	1930				875,534				2,758,401
	1931				963,435				1,963,575
	1932				983,390				1,935,450
	1933				1,449,184				3,289,640
TOTAL (in bales of 400 lb.) ...	1930				218,883				
	1931				240,859				
	1932				245,848				
	1933				362,296				

TABLE VII.

EXPORTS OF ESSENTIAL OILS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA ... (Essential and Perfumed)	1930	gal.	162	392	849	1,403	700	186	2,922	3,808
	1931	"	152	353	1,381	1,886	362	220	7,509	8,091
	1932	"	3,087	203	1,143	4,433	3,569	124	5,662	9,355
	1933	"	2,652	140	947	3,739	2,747	804	5,226	8,777
CEYLON ... (Citronella)	1930	lb.	282,897	148,026	782,619	1,213,542	23,940	12,049	64,964	100,953
	1931	"	278,200	162,762	762,520	1,203,482	16,670	9,640	44,812	71,122
	1932	"	328,629	135,564	815,608	1,279,801	23,377	9,372	57,470	90,219
	1933	"	301,272	169,527	988,624	1,459,423	20,212	11,122	64,203	95,537
(Cinnamon Leaf and Cinnamon Bark)	1930	lb.	13,269	17,076	61,784	92,129	3,450	4,439	16,783	24,672
	1931	"	21,182	20,298	99,355	140,835	5,426	19,864	34,700	59,990
	1932	"	24,404	22,469	98,480	145,353	5,343	4,807	21,025	31,175
	1933	"	18,237	20,530	124,966	163,733	2,691	2,952	18,695	24,338
SEYCHELLES ... (Mostly Cinnamon Leaf)	1930	lb.	4,085	—	112,411	116,496	1,365	—	25,135	26,500
	1931	"	7,526	—	121,934	129,460	1,394	—	20,611	22,005
	1932	"	6,416	132	108,428	114,976	1,710	27	14,264	16,001
	1933	"	1,505	—	133,785	135,290	534	—	15,087	15,621
BRITISH GUIANA ... (Lime)	1930	gal.	444	—	216	660	5,400	—	2,557	7,957
	1931	"	206	—	384	590	2,759	—	5,491	8,250
	1932	"	170	51	509	730	2,223	620	6,427	9,270
	1933	"	946	—	220	1,166	10,679	—	2,865	13,544
JAMAICA ... (Mainly Orange)	1930	gal.	3,039	31	5,679	8,749	5,453	107	10,039	15,599
	1931	"	3,437	96	6,537	10,070	5,627	171	10,380	16,178
	1932	"	1,866	72	6,614	8,552	3,208	614	9,135	12,957
	1933	"	2,195	47	6,655	8,897	4,862	356	11,490	16,708
LEeward ISLANDS ... (Lime)	1930	lb.	13,104	814	13,604	27,522	18,836	1,145	20,194	40,175
	1931	"	6,121	455	10,524	17,100	10,060	683	17,242	27,985
	1932	"	3,445	450	9,524	13,419	3,890	500	14,204	18,594
	1933	{ gal. lb.	430 317	7 3	725 —	1,162 320	5,105	81	8,929	14,115
(Other) ...	1930	lb.	4,970	554	18,157	23,681	6,162	425	5,198	11,785
	1931	"	5,695	619	13,497	19,811	2,061	162	3,522	5,745
	1932	"	4,918	775	17,240	22,933	2,297	178	3,301	5,776
	1933	"	1,992	849	20,460	23,301	427	191	3,458	4,076
TRINIDAD AND TOBAGO ... (Lime)	1930	gal.	627	—	1,020	1,647	9,156	—	10,301	19,457
	1931	"	1,240	34	1,139	2,413	17,455	395	14,221	32,071
	1932	"	195	70	665	930	2,824	901	9,115	12,840
	1933	"	535	44	1,316	1,895	6,115	571	15,910	22,596
WINDWARD ISLANDS ... (Mostly Lime)	1930	gal.	736	15	1,280	2,031	9,136	206	15,922	25,264
	1931	"	821	90	1,499	2,410	8,549	1,600	19,380	29,529
	1932	"	666	280	1,221	2,167	8,845	1,708	15,266	25,819
	1933	"	503	92	984	1,579	6,343	1,106	9,629	17,078
WEST INDIES AND AMERICA— TOTALS.	1930	{ gal. lb.	4,846 18,074	46 1,368	8,195 31,761	13,087 51,203	54,143	1,883	64,211	120,237
	1931	{ gal. lb.	5,110 11,816	220 1,074	9,396 24,021	14,726 36,911	45,872	3,011	70,029	118,912
	1932	{ gal. lb.	2,897 8,363	473 1,225	9,009 26,764	12,379 36,352	23,287	4,521	57,448	85,256
	1933	{ gal. lb.	4,609 2,309	190 852	9,900 20,460	14,699 23,621	33,531	2,305	52,281	88,117
GRAND TOTALS	1930	{ gal. lb.	5,008 318,325	438 166,470	9,044 988,575	14,490 1,473,370	83,598	18,557	174,015	276,170
	1931	{ gal. lb.	5,262 318,724	573 184,134	10,777 1,007,830	16,612 1,510,688	69,724	32,735	177,661	280,120
	1932	{ gal. lb.	5,984 367,812	676 159,390	10,152 1,049,280	16,812 1,576,482	57,286	18,851	155,869	232,006
	1933	{ gal. lb.	7,261 323,323	330 190,909	10,847 1,267,835	18,438 1,782,067	59,715	17,183	155,492	232,390

TABLE VIII.
EXPORTS OF FIBRES (OTHER THAN COTTON) FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA ... (Sisal Fibre and Tow)	1930	3,311	200	12,450	15,961	96,375	5,532	335,956	437,863
	1931	1,587	237	14,172	15,996	24,597	3,719	204,283	232,599
	1932	4,770	413	10,202	15,385	57,529	5,121	123,925	186,575
	1933	6,208	819	12,834	19,861	75,558	10,113	164,311	249,982
TANGANYIKA TERRITORY ... (Sisal Fibre and Tow)	1930	1,440	1,123	47,399	49,962	28,996	32,125	1,111,194	1,172,315
	1931	2,938	671	52,330	55,939	33,266	7,654	666,257	707,177
	1932	15,667	856	44,031	60,554	178,380	7,615	512,207	698,202
	1933	17,031	2,616	49,953	69,600	207,140	33,398	641,234	881,772
EAST AFRICA—TOTALS (in- cluding Nyasaland—sisal— and Somaliland).	1930	6,035	1,323	59,849	67,208	154,978	37,657	1,447,150	1,639,812
	1931	4,767	908	66,502	72,177	60,521	11,373	870,542	942,436
	1932	20,437	1,269	54,233	75,939	235,909	12,739	636,132	884,790
	1933	23,259	3,435	62,787	89,481	282,860	43,511	805,545	1,131,916
WEST AFRICA — TOTALS (in- cluding Gold Coast, Nigeria and Sierra Leone) (Piassava)	1930	744	57	2,488	3,289	17,726	1,377	36,917	56,020
	1931	732	66	2,879	3,677	9,803	1,089	32,277	43,169
	1932	917	65	2,160	3,142	8,338	1,040	17,202	26,580
	1933	1,670	94	2,173	3,937	14,588	1,557	19,398	35,543
ST. HELENA ... (New Zealand Hemp and Tow)	1930	846	37	—	833	15,994	811	—	16,805
	1931	—	—	—	940	—	—	—	14,668
	1932	—	—	—	378	—	—	—	4,618
	1933	—	—	—	963	—	—	—	9,426
CEYLON ... (Cair bristle and mattress and kitul)	1930	5,173	4,945	13,999	24,117	15,681	9,841	109,370	134,892
	1931	6,638	4,378	13,737	24,753	18,838	8,722	90,696	118,256
	1932	6,529	4,348	11,664	22,591*	22,058	7,490	86,771	116,533*
	1933	7,976	5,080	14,226	27,318*	24,915	11,063	86,423	122,493*
MAURITIUS ... (Mauritius Hemp)	1930	172	2	1,271	1,445	3,151	30	22,911	26,092
	1931	42	—	406	448	615	—	6,308	6,923
	1932	153	—	257	410	2,143	—	3,900	6,043
	1933	182	—	233	415	3,128	—	3,457	6,585
GRAND TOTALS — (includ- ing North Borneo, Cyprus, Bahamas, Jamaica, Turks and Caicos Islands, St. Lucia, St. Vincent and Trinidad).	1930				97,378				1,881,361
	1931				102,103				1,127,472
	1932				102,633*				1,040,295*
	1933				122,292*				1,308,106*

* Includes exports for Ships' Stores.

TABLE IX.

EXPORTS OF BANANAS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
NIGERIA (Fresh and dried, and plantains)	1930	cwt.	—	3	8,914	8,917	—	4	25,398	25,402
	1931	"	—	3	127,680	127,683	—	4	34,967	34,971
	1932	"	1	—	307,906	307,907	1	—	45,313	45,314
	1933	"	—	—	346,900	346,900	—	—	50,781	50,781
PALESTINE... ..	1930	cwt.	—	—	4,925	4,925	—	—	6,994	6,994
	1931	"	6	185	3,919	4,110	4	152	4,596	4,752
	1932	"	—	40	1,369	1,409	—	27	1,729	1,756
	1933	"	—	—	89	89	—	—	63	63
JAMAICA (Fresh and dried and plantains)	1930	{ cwt. stems	355 7,399,146	1 3,184,318	285 14,013,190	641 24,596,654	731,468	315,357	1,264,274	2,311,099
	1931	{ cwt. stems	618 8,456,194	11 3,335,348	2,783 10,544,136	3,412 22,335,678	803,848	307,229	876,290	1,987,367
	1932	{ cwt. stems	291 13,258,522	1 2,645,962	1,490 4,456,129	1,782 20,360,613	1,266,270	235,904	369,467	1,871,641
	1933	{ cwt. stems	120 8,387,682	— 1,832,468	— 337,319	120 10,557,369	805,762	179,394	33,501	1,018,657
OTHER BRITISH WEST INDIES (including British Guiana, British Hon- duras, Trinidad and Tobago, Leeward and Windward Islands) (Fresh and plantains)	1930	bunches	—	8,174	92,986	101,160	—	695	6,781	7,476
	1931	"	81	7,920	90,741	98,742	17	546	6,594	7,157
	1932	"	1,345	12,610	83,927	97,882	229	645	5,927	6,801
	1933	"	16,457	70,967	146,423	233,847	1,104	3,967	10,257	15,328
FIJI	1930	cases	—	84,509	—	84,522*	—	57,168	—	57,178*
	1931	bunches	—	194,875	—	194,875	—	57,368	—	57,368
	1932	"	—	346,968	—	346,968	—	67,237	—	67,237
	1933	"	—	326,422	—	326,422	—	69,243	—	69,243
TONGA†	1930									—
	1931†									693
	1932†									10,452
	1933	cases				16,777				3,700
GRAND TOTALS (includ- ing plantains not included in bunch or stem figures).	1930									2,408,235*
	1931									2,092,598
	1932									2,003,312
	1933									1,158,282

* Includes exports for Ships' Stores.

† Quantity figures not available.

‡ Particulars of destination not available.

TABLE X.

EXPORTS OF CITRUS FRUITS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
CYPRUS (Oranges)	1930	No.	59,246	9,284	17,981,651	18,070,531*	103	17	39,942	40,109*
	1931	"	1,127,946	6,988	20,473,000	21,607,934	1,877	11	41,326	43,214
	1932	"	1,181,571	50,721	16,112,645	17,344,937	2,730	30	26,612	29,372
	1933	"	6,908,037	634,242	12,684,145	20,226,424	10,955	824	22,719	34,498
(Lemons)	1930	No.	13,700	163,850	910,640	1,094,790*	11	199	695	911*
	1931	"	1,068,000	—	1,425,655	2,493,655	1,011	—	912	1,923
	1932	"	566,438	920,750	609,185	2,096,373	730	620	369	1,719
	1933	"	819,870	2,197,500	95,345	3,112,715	820	1,655	79	2,554
PALESTINE... .. (Oranges in bulk and in boxes)	1930	{ tons boxes	— 2,146,029	— 12,803	4,992 696,209	4,992 2,857,041	643,918	3,841	259,384	907,143
	1931	{ tons boxes	— 1,837,339	— 15,656	1,788 763,456	1,788 2,616,451				
	1932	{ tons boxes	— 2,493,685	— 36,956	998 993,958	998 3,524,599	1,207,266	17,006	485,334	1,709,606
	1933	{ tons boxes	— 3,037,385	— 27,312	327 1,135,218	327 4,199,915				
(Lemons in bulk and in boxes)	1930	{ tons boxes	— 2,700	— 329	220 2,354	220 5,383	710	99	626	1,435
	1931	{ tons boxes	— 2,563	— 56	135 4,252	135 6,871				
	1932	{ tons boxes	— 7,595	— 174	28 6,516	28 14,285	3,182	70	2,790	6,042
	1933	{ tons boxes	— 7,025	— —	— 10,135	— 17,160				
(Grapefruit)	1930	boxes	19,108	486	9,719	29,313	6,575	179	3,537	10,291
	1931	"	61,608	807	18,092	80,507	30,803	403	9,044	40,250
	1932	"	119,686	1,142	28,973	149,801	63,460	613	15,491	79,564
	1933	"	185,880	—	64,946	250,826	95,817	—	33,367	129,184
(Citrons)†	1930						126	15	2,867	3,006
	1931						87	88	2,035	2,210
	1932						72	28	3,413	3,513
	1933						154	—	2,143	2,297
JAMAICA (Oranges)	1930	boxes	3,594	21,819	1,546	26,959	1,747	10,249	744	12,740
	1931	"	2,384	32,671	490	35,545	1,192	16,335	246	17,773
	1932	"	2,865	89,810	61	92,736	1,475	43,666	30	45,171
	1933	"	2,757	89,744	—	92,501	1,356	41,479	—	42,835
(Grapefruit, fresh and canned)	1930	{ pkgs. No.	— 6,659,596	— 2,308,071	— 117,154	— 9,084,821	40,456	13,084	871	54,411
	1931	{ pkgs. No.	151 5,149,560	314 4,657,988	10 123,488	475 9,931,036				
	1932	{ pkgs. No.	538 10,178,159	395 3,607,211	98 4,000	1,031 13,789,370	53,192	18,294	84	71,570
	1933	{ pkgs. No.	— 9,775,576	— 2,090,683	— —	— 11,866,259				
(Other)	1930						6	437	4,910	5,353
	1931						21	354	2,512	2,887
	1932						28	331	4,519	4,873
	1933						60	1,037	4,004	5,101
OTHER BRITISH WEST INDIES (including British Guiana, British Honduras, Trinidad and Tobago, Leeward and Windward Islands) (Oranges and Tangerines)	1930						214	3,204	68	3,486
	1931						242	4,934	38	5,214
	1932						120	7,218	78	7,416
	1933						634	9,537	65	10,236
(Grapefruit)	1930						3,109	1,724	8	4,841
	1931						2,502	2,060	23	4,585
	1932						8,453	4,610	16	13,079
	1933						4,905	3,263	49	8,217
(Limes, fresh, green and pickled)	1930						115	1,430	29,098	30,643
	1931						344	1,871	18,009	20,224
	1932						371	2,084	14,763	17,218
	1933						223	3,700	10,283	14,206

Table X—continued

Colony, etc.	Year.	Quantity exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
OTHER BRITISH WEST INDIES—continued. (Lemons)	1930					—	33	—	33
	1931					—	34	—	34
	1932					—	—	—	—
	1933					—	—	—	—
GRAND TOTALS (including Malta).	1930					697,498	34,516	344,525	1,076,592*
	1931					688,264	55,170	351,660	1,095,094
	1932					1,341,170	94,611	553,684	1,989,465
	1933					1,575,173	84,252	610,642	2,270,067

* Includes exports for Ships' Stores.
† Quantity figures not available.

TOTAL VALUE OF EACH CITRUS FRUIT EXPORTED FROM THE COLONIAL EMPIRE.

	Year.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.	
Oranges, Mandarines and Tangerines.	1930	646,394	17,449	300,141	964,031
	1931	627,649	26,474	316,628	970,751
	1932	1,211,694	68,144	512,053	1,791,891
	1933	1,418,922	64,721	556,776	2,040,419
Lemons	1930	721	353	3,093	4,173
	1931	1,780	50	2,884	4,714
	1932	3,912	690	3,345	7,947
	1933	3,489	1,656	4,021	9,166
Limes	1930	117	1,712	34,008	35,837
	1931	346	2,041	20,521	22,908
	1932	387	2,232	19,282	21,901
	1933	258	4,169	14,286	18,713
Citrons	1930	126	15	2,867	3,008
	1931	87	88	2,035	2,210
	1932	72	28	3,413	3,513
	1933	154	—	2,143	2,297
Grapefruit	1930	50,140	14,987	4,416	69,543
	1931	58,402	26,517	9,592	94,511
	1932	125,105	23,517	15,591	164,213
	1933	152,350	13,706	33,416	199,472

TABLE XI.
EXPORTS OF LIME JUICE FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in gallons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
BRITISH WEST INDIES (including British Guiana, Jamaica, Trinidad and Tobago, the Leeward and Windward Islands).	1930	106,188	—	2,258	108,446	16,912	—	357	17,269
	1931	31,355	7	—	31,362	4,021	1	—	4,022
	1932	22,382	—	—	22,382	889	—	—	889
	1933	63,783	782	2,059	66,624	3,439	27	135	3,601
(Concentrated)									
(Raw)	1930	185,070	78,032	2,140	265,242	12,502	3,909	68	16,479
	1931	98,992	47,838	31,625	178,455	6,252	2,493	1,351	10,096
	1932	107,421	55,334	22,416	185,171	8,272	2,629	1,059	11,960
	1933	89,178	20,746	109	110,033	6,280	1,255	8	7,543
(Other)	1930	164	765	37	966	41	47	9	97
	1931	245	—	79	324	61	—	20	81
	1932	260	—	—	260	130	—	—	130
	1933	—	50	—	50	—	3	—	3
GRAND TOTALS	1930	291,422	78,797	4,435	374,654	29,455	3,956	434	33,845
	1931	130,592	47,845	31,704	210,141	10,334	2,494	1,371	14,199
	1932	130,063	55,334	22,416	207,813	9,291	2,629	1,059	12,979
	1933	152,961	21,578	2,168	176,707	9,719	1,285	143	11,147

TABLE XII.
EXPORTS OF PINEAPPLES FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
BRITISH MALAYA (Canned)	1930	owt.	803,600	202,440	153,160	1,159,200	623,154	164,424	129,311	916,889
	1931	"	884,220	204,920	100,040	1,189,180	604,174	147,083	75,145	826,402
	1932	"	1,113,980	117,420	94,440	1,325,840	774,498	79,312	69,570	923,380
	1933	"	916,120	183,340	92,160	1,191,620	553,811	114,509	64,983	733,303
OTHER COLONIES (including Bahamas, British Guiana, British Honduras, Jamaica, the Leeward and Windward Islands, Fiji and Tonga).	1930						2,561	6,467	25	9,055
	1931						2,310	5,249	8	7,667
	1932						3,133	5,210	595	8,969
	1933						1,174	3,855	1,677	6,789
GRAND TOTALS	1930									925,944*
	1931									834,069*
	1932									932,369
	1933									740,092

* Includes exports for Ships' Stores.

TABLE XIII.

EXPORTS OF GUMS AND RESINS (EXCEPT RUBBER) FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in cwt. exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
TANGANYIKA TERRITORY ... (Arabic and Copal)	1930	529	8,664	1,867	11,060	2,067	10,372	2,397	14,836
	1931	860	8,760	20	9,640	3,119	7,449	15	10,583
	1932	500	19,960	—	20,460	1,557	13,983	—	15,540
	1933	1,100	18,580	620	20,300	3,156	11,692	391	15,239
SOMALILAND PROTECTORATE (Arabic, Frankincense, etc.)	1930				13,261				20,258
	1931				11,880				13,726
	1932				16,669				10,489
	1933				8,467				9,112
EAST AFRICA—TOTALS (includ- ing Copal from Kenya and Uganda).	1930	996	8,664	1,867	24,788	3,735	10,372	2,397	36,762
	1931	1,201	8,760	20	21,861	4,814	7,449	15	26,004
	1932	730	19,960	23	37,382	2,731	13,983	100	27,303
	1933	1,381	18,580	620	29,048	4,360	11,692	391	25,555
WEST AFRICA — TOTALS (mainly Arabic from Nigeria).	1930	2,587	—	—	2,587	4,675	—	—	4,675
	1931	5,791	—	47	5,838	7,880	—	114	7,994
	1932	11,846	5	153	12,004	10,805	10	206	11,021
	1933	10,495	—	299	10,794	12,100	—	426	12,526
MALAYA (Damar)	1930				34,940				31,976
	1931				64,140				45,034
	1932				47,080				28,854
	1933				54,100				36,846
(Gutta Percha)	1930				7,540				27,092
	1931				9,200				29,639
	1932				7,680				22,576
	1933				12,580				29,504
MALAYA — TOTALS* (includ- ing Copal, Dragon's Blood, Sticklac and Jelutong).	1930				52,060				92,092
	1931				74,560				79,946
	1932				60,360				63,640
	1933				68,620				69,980
DEPENDENCIES IN BORNEO (Jelutong)	1930				87,304				109,721
	1931				79,124				65,567
	1932				69,003				54,818
	1933				75,099				107,811
(Damar)	1930				65,383				24,694
	1931				43,646				17,075
	1932				51,845				13,847
	1933				76,831				18,959
(Other)	1930				3,302				6,560
	1931				3,569				5,079
	1932				2,645				3,384
	1933				3,454				4,322
BRITISH GUIANA (mainly Balata)	1930	7,665	—	1,232	8,897	69,545	4	11,448	80,997
	1931	5,436	1	1,400	6,837	42,155	17	11,691	53,862
	1932	4,345	—	1,367	5,712	25,545	3	5,406	30,954
	1933	3,877	1	404	4,282	24,695	5	1,868	26,568
BRITISH HONDURAS (Chicle)	1930	76	632	2,626	3,334	833	6,654	27,853	35,340
	1931	—	—	3,577	3,577	—	—	35,290	35,290
	1932	667	881	1,704	3,252	4,906	6,911	14,082	25,899
	1933	13	3,624	2,852	6,489	46	24,835	18,332	43,213
GRAND TOTALS (includ- ing Mauritius and Fiji).	1930				250,530				394,866
	1931				240,037				291,910
	1932				245,277				233,969
	1933				274,617				308,938

* The quantities given in the Malayan exports are the net exports, i.e. the excess of total exports over imports. The values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XIV.
EXPORTS FROM AND PRODUCTION OF TIN IN THE COLONIAL EMPIRE.

1. EXPORTS.

<i>Colony, etc.</i>	<i>Year.</i>	<i>Quantity in tons exported to</i>			<i>Total.</i>	<i>Value in £ exported to</i>			<i>Total.</i>
		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	
KENYA AND UGANDA ... (Tin Ore and Concentrates)	1930	351	—	—	351	55,300	—	—	55,300
	1931	154	—	16	170	22,176	—	2,260	24,436
	1932	316	19	—	335	45,504	1,664	—	47,168
	1933	294	74	60	428	40,809	8,054	8,640	57,503
TANGANYIKA TERRITORY ... (Tin Ore and Concentrates)	1930	—	10	—	10	—	800	—	800
	1931	—	21	—	21	—	1,780	—	1,780
	1932	—	94	—	94	—	8,397	—	8,397
	1933	—	80	—	80	—	10,161	—	10,161
NIGERIA (Tin Ore and Concentrates)	1930	12,067	—	—	12,067	1,373,466	—	—	1,373,466
	1931	10,794	—	—	10,794	906,185	—	—	906,185
	1932	5,967	—	—	5,967	579,504	—	—	579,504
	1933	5,216	—	—	5,216	658,598	—	—	658,598

2. PRODUCTION.

FEDERATED MALAY STATES (In terms of block tin)	1930				62,065				8,941,134
	1931				53,457				5,965,750
	1932				28,363				3,655,967
	1933				23,925				4,394,302
STRAITS SETTLEMENTS ... (In terms of block tin)	1930				5				629
	1931				16				2,396
	1932				38				4,332
	1933				57				10,653
UNFEDERATED MALAY STATES (In terms of block tin)	1930				1,910				237,850
	1931				1,436				158,678
	1932				1,341				174,834
	1933				923				170,582
GRAND TOTALS (In terms of block tin)	1930				72,823				10,609,179
	1931				62,087				7,059,225
	1932				34,373				4,470,202
	1933				28,981				5,301,799

TABLE XV.
EXPORTS OF MINERAL OIL FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
BRUNET† (Crude)	1930†									
	1931					4,326				3,134
	1932					176,275				127,711
	1933					280,523				205,434
SARAWAK (Benzine)	1930	tons				183,933				1,030,023
	1931	"				128,401				572,241
	1932	"				94,474				288,675
	1933	"				78,990				204,139
(Crude)	1930	tons				124,364				145,092
	1931	"				94,849				92,991
	1932	"				127,763				112,416
	1933	"				128,684				104,804
(Kerosene)	1930	tons				64,209				164,804
	1931	"				38,141				87,226
	1932	"				50,379				120,773
	1933	"				34,405				75,407
(Fuel)	1930	tons				235,118				274,305
	1931	"				202,939				206,388
	1932	"				196,422				173,185
	1933	"				245,451				197,582
(Solar)	1930	tons				37,775				70,513
	1931	"				46,550				74,485
	1932	"				50,967				50,958
	1933	"				81,134				65,793
TRINIDAD (Crude)	1930	gal.	22,022,181	6,309	15,420,971	37,449,461	144,803	144	78,028	222,975
	1931	"	7,153,755	2,329,113	83,488,175	92,971,043	42,721	11,806	356,971	411,498
	1932	"	1,880,455	7,583,160	82,320,158	91,783,773	8,038	46,327	483,088	537,453
	1933	"	12,233,539	2,816,532	25,849,113	40,899,184	45,698	10,586	130,558	186,842
(Fuel)	1930	gal.	49,387,605	27,861,349	22,790,188	175,861,921*	376,230	223,520	144,981	1,310,048*
	1931	"	49,259,759	23,914,541	23,259,717	155,653,752*	197,950	168,775	89,913	721,652*
	1932	"	36,349,835	21,197,208	39,328,405	175,191,068*	158,294	142,279	151,255	812,553*
	1933	"	485,087	21,309,210	46,658,078	193,395,203*	2,021	129,020	243,062	1,003,105*
Kerosene)	1930	gal.	—	857,042	939,218	1,804,455*	—	28,716	21,778	50,669*
	1931	"	1,250	1,000,715	402,793	1,413,686*	14	28,096	12,505	40,856*
	1932	"	294	1,003,996	1,136,937	2,145,226*	6	29,238	18,911	48,280*
	1933	"	—	1,642,802	1,241,074	2,886,691*	—	53,675	28,497	82,275*
(Motor Spirit)	1930	gal.	2,339,280	5,586,955	45,327,871	53,288,543*	53,406	167,735	978,510	1,201,094*
	1931	"	8,300,776	6,177,999	48,755,266	63,268,185*	76,747	181,723	506,729	766,582*
	1932	"	19,282,169	15,990,677	32,605,701	67,891,008*	262,808	270,922	444,161	978,444*
	1933	"	37,418,194	24,704,854	2,037,662	74,188,469*	481,097	300,786	58,677	973,336*
GRAND TOTALS— (including Road and Lubricating Oils from Trinidad)	1930	{ gal. tons				268,758,239* 645,399				4,475,432*
	1931	{ gal. tons				313,750,609* 515,206				2,985,920*
	1932	{ gal. tons				337,311,591* 696,280				3,256,564*
	1933	{ gal. tons				311,825,444* 849,187				3,107,214*

* Includes exports for Ships' Stores, Bunkers and use of aeroplanes.

† Particulars of destination not available.

‡ Information not available, no statistics having been kept.

TABLE XVI.
EXPORTS OF DIAMONDS FROM THE COLONIAL EMPIRE.

<i>Colony, etc.</i>	<i>Year.</i>	<i>Quantity in carats exported to</i>			<i>Total.</i>	<i>Value in £ exported to</i>			<i>Total.</i>
		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	
TANGANYIKA TERRITORY ...	1930	—	13,337	—	13,337	—	32,962	—	32,962
	1931	—	7,790	—	7,790	—	9,698	—	9,698
	1932	—	1,391	—	1,391	—	1,666	—	1,666
	1933	—	1,373	—	1,373	—	2,389	—	2,389
GOLD COAST	1930	861,119	—	—	861,119	658,994	—	—	658,994
	1931	880,479	—	—	880,479	440,924	—	—	440,924
	1932	842,297	—	—	842,297	536,946	—	—	536,946
	1933	803,985	—	—	803,985	518,400	—	—	518,400
SIERRA LEONE	1930	—	—	—	—	—	—	—	—
	1931	—	—	—	—	—	—	—	—
	1932	748	—	—	748	1,497	—	—	1,497
	1933	26,901	—	—	26,901	73,266	—	—	73,266
BRITISH GUIANA	1930	49,296	—	52,755	102,051	132,932	—	163,724	296,656
	1931	22,870	—	42,680	65,550	41,085	—	69,921	111,006
	1932	24,555	—	32,514	57,069	47,352	—	64,842	112,194
	1933	22,967	—	27,937	50,904	52,949	—	62,040	114,989
GRAND TOTALS	1930	910,415	13,337	52,755	976,507	791,926	32,962	163,724	988,612
	1931	903,349	7,790	42,680	953,819	482,009	9,698	69,921	561,628
	1932	867,600	1,391	32,514	901,505	585,795	1,666	64,842	652,303
	1933	853,853	1,373	27,937	883,163	644,615	2,389	62,040	709,044

TABLE XVII.

EXPORTS OF "OTHER MINERALS" FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA ... (Almost all carbonate of soda)	1930	tons	—	12,464	36,811	49,275	—	56,580	165,825	222,405
	1931	"	7	8,060	36,104	44,171	32	36,664	162,698	199,394
	1932	"	—	13,133	24,130	37,263	—	60,635	109,337	169,972
	1933	"	30	15,295	27,754	43,079	837	69,729	125,179	195,745
TANGANYIKA TERRITORY ... (Almost all Mica)	1930	tons	16	—	5	21	8,980	323	2,951	12,254
	1931	"	3	1	27	31	1,045	108	2,964	4,117
	1932	"	7	—	5	12	2,330	42	1,989	4,361
	1933	"	3	2	28	33	625	95	2,495	3,215
NORTHERN RHODESIA ... (Copper Ore and Concentrates)	1930	tons of 2,000 lb.	—	—	144	144	1	—	3,077	3,078
	1931	"	—	—	25,525	25,525	—	—	342,885	342,885
	1932	"	28	—	240	268	550	—	3,098	3,648
	1933	"	29	—	—	29	515	—	—	515
(Copper Blister Bar and Ingot)	1930	centals	119,774	4	—	119,778	223,294	10	—	223,304
	1931	"	62,411	3	45,631	108,045	99,595	8	62,716	162,319
	1932	"	418,525	4	1,203,753	1,622,278	547,585	6	1,536,381	2,083,972
	1933	"	693,076	2	1,615,605	2,308,683	942,401	4	2,171,698	3,114,103
(Zinc Ingots) ...	1930	centals	210,998	9,920	120,726	341,644	210,982	9,913	120,765	341,660
	1931	"	124,745	—	137,770	262,515	94,513	—	106,162	200,675
	1932	"	1,450	—	—	1,450	1,088	—	—	1,088
	1933	"	246,336	—	121,581	367,917	184,519	—	91,315	275,834
(Vanadium) ...	1930	tons of 2,000 lb.	860	—	—	860	24,685	—	25	24,710
	1931	"	—	—	565	565	—	—	17,871	17,871
	1932	"	—	—	1,005	1,005	—	—	32,266	32,266
	1933	"	—	—	—	—	—	—	—	—
(Fused Vanadic Oxide) ...	1930	lb.	—	—	—	—	—	—	—	—
	1931	"	399,485	—	27,017	426,502	69,034	—	4,726	73,760
	1932	"	875,844	—	66,800	942,644	152,917	—	11,835	164,752
	1933	"	44,645	—	67,367	112,212	7,848	—	11,790	19,638
EAST AFRICA—TOTALS (including other minerals from Northern Rhodesia)	1930						475,603	66,826	299,382	841,811
	1931						264,277	36,780	700,022	1,001,079
	1932						704,536	60,683	1,694,906	2,460,125
	1933						1,136,765	69,828	2,402,477	3,609,070
GOLD COAST ... (Mostly Manganese ores)	1930	tons	2,522	82,757	332,191	417,500	12,917	151,685	659,607	824,209
	1931	"	4,878	36,053	206,278	247,209	32,999	47,520	309,495	390,014
	1932	"	8,451	—	42,255	50,706	53,902	—	70,392	124,294
	1933	"	20,036	29,555	215,561	265,152	54,771	46,564	256,226	357,561
NIGERIA ... (Metalliferous Ores—other than Tin)	1930	tons	110	—	253	363	2,002	—	5,026	7,028
	1931	"	—	—	1,700	1,700	—	—	30,008	30,008
	1932	"	2	—	1,329	1,331	243	—	27,021	27,264
	1933	"	9	—	798	789	115	1	6,938	7,054
(Coal) ...	1930	tons	1	44,994	817	45,812	1	48,244	858	49,103
	1931	"	—	24,803	10	24,813	—	25,988	11	25,999
	1932	"	—	28,016	—	28,016	—	28,551	—	28,551
	1933	"	—	23,943	15	23,958	—	25,120	24	25,144
WEST AFRICA—TOTALS (including Sierra Leone and other minerals from Nigeria)	1930						18,577	201,480	665,894	885,951
	1931						35,967	75,331	339,962	451,260
	1932						58,647	30,649	97,467	186,763
	1933						57,373	73,116	263,250	393,739
CEYLON ... (Plumbago)	1930	tons	1,408	701	6,615	8,724	21,234	10,558	101,357	133,149
	1931	"	867	557	5,297	6,721	11,845	7,666	72,388	91,899
	1932	"	1,192	697	4,211	6,100	14,426	8,822	53,498	76,746
	1933	"	1,480	746	7,333	9,559	14,193	7,119	69,705	91,017
(Other) ...	1930						—	213	464	677
	1931						379	93	181	653
	1932						331	56	240	627
	1933						10	41	265	316

Table XVII—continued.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
MALAYA (Iron Ore and Scrap)	1930	tons	—	1,187	782,456	783,643	—	5,462	462,707	468,169
	1931	"	—	1,769	695,478	697,247	—	7,133	391,649	398,782
	1932	"	—	2,106	693,343	695,449	—	7,909	391,562	399,471
	1933	"	—	1,102	778,444	779,546	—	4,245	430,971	435,216
(Tungsten Ore)	1930	tons	882	—	158	1,040	60,564	—	11,461	72,025
	1931	"	548	—	1	549	29,419	—	46	29,465
	1932	"	399	—	25	424	15,092	—	700	15,792
	1933	"	938	—	133	1,071	40,319	—	5,475	45,794
(Phosphates)	1930	tons	—	24,593	95,340	119,933	—	48,776	189,093	237,869
	1931	"	—	—	65,849	65,849	—	—	130,603	130,603
	1932	"	—	—	84,197	84,197	—	—	166,996	166,996
	1933	"	—	—	91,280	91,280	—	—	181,040	181,040
(Other ores including Man- ganese)	1930	tons	—	—	20,697	20,697	—	—	19,344	19,344
	1931	"	—	—	8,946	8,946	—	—	8,876	8,876
	1932	"	—	—	9,278	9,278	—	—	8,797	8,797
	1933	"	—	105	11,678	11,783	—	248	11,474	11,722
DEPENDENCIES IN BORNEO* (Coal)	1930	tons	—	—	—	35,839	—	—	—	41,813
	1931	"	—	—	—	21,980	—	—	—	25,928
	1932	"	—	—	—	11,953	—	—	—	13,953
	1933	"	—	—	—	4,609	—	—	—	5,358
CYPRUS (Asbestos)	1930	tons	1,291	—	4,109	5,400	29,139	—	86,953	116,092
	1931	"	545	—	3,026	3,571	12,399	—	53,982	66,381
	1932	"	1,519	—	81	1,600	26,204	—	1,010	27,214
	1933	"	1,786	—	2,781	4,567	29,147	—	14,941	44,088
(Cupriferos Pyrites) ...	1930	tons	14,400	—	224,088	238,488	14,910	—	233,531	248,441
	1931	"	10,406	—	189,380	199,786	10,612	—	184,588	194,750
	1932	"	14,210	—	163,420	177,630	12,205	—	154,347	166,552
	1933	"	11,200	—	198,770	209,970	9,039	—	186,740	195,779
(Other, mainly Terra Umbra)	1930	tons	2,075	—	2,358	4,433	4,365	—	6,588	10,953
	1931	"	1,313	—	1,803	3,116	2,954	—	4,318	7,272
	1932	"	1,619	1	869	2,489	3,581	6	2,684	6,271
	1933	"	1,989	1,111	3,280	6,380	4,987	370	6,368	11,725
BRITISH GUIANA (Bauxite)	1930	tons	—	—	119,616	119,616	—	—	123,954	123,954
	1931	"	—	—	125,095	125,095	—	—	129,805	129,805
	1932	"	103	—	64,785	64,888	262	—	103,127	103,389
	1933	"	891	—	35,025	35,916	1,224	—	53,766	54,990
TURKS AND CAICOS ISLANDS (Salt)	1930	bushels	—	76,437	434,305	510,742	—	1,258	7,463	8,721
	1931	"	—	96,684	267,025	363,709	—	1,295	3,737	5,032
	1932	"	—	151,920	144,548	296,468	—	1,992	2,290	4,282
	1933	"	—	526,743	161,098	687,841	—	10,635	2,854	13,489
TRINIDAD (Asphalt)	1930	tons	44,005	7,973	66,077	118,055	132,015	23,869	157,513	313,397
	1931	"	40,256	6,526	46,386	93,168	112,520	11,279	112,798	236,597
	1932	"	24,936	2,977	23,575	51,488	65,187	5,155	61,309	131,651
	1933	"	23,795	7,403	20,791	51,989	69,890	20,112	60,862	150,864
WEST INDIES AND AMERICA— TOTALS (including Manjak from Barbados)	1930						132,162	25,133	289,135	446,430
	1931						112,637	12,607	246,498	371,742
	1932						65,779	7,149	166,950	239,878
	1933						71,234	30,747	117,842	219,823
GILBERT AND ELLICE ISLANDS COLONY. (Phosphate of Lime).	1930	tons	—	—	—	207,863*	—	—	—	259,828*
	1931	"	—	145,122	—	145,122	—	159,634	—	159,634
	1932	"	—	—	—	142,200*	—	—	—	191,970*
	1933	"	—	201,000	23,200	224,200	—	271,350	31,320	302,670
GRAND TOTALS (including Palestine).	1930									3,788,138
	1931									2,998,356
	1932									3,992,435
	1933									5,448,994

* Particulars of destination not available.

TABLE XVIII.
EXPORTS OF FRESH COCONUTS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		No. exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
EAST AFRICA—TOTALS ... (mainly Zanzibar).	1930						—	2,646	300	2,960*
	1931						—	1,822	669	2,498*
	1932						—	1,716	469	2,185
	1933						5	1,666	793	2,468*
CEYLON	1930		6,388,138	968,496	13,393,703	20,750,337	23,122	3,776	46,010	72,908
	1931		6,729,594	1,306,580	13,106,002	21,142,176	17,980	3,893	35,086	56,959
	1932		5,941,882	6,945,093	10,257,491	23,144,466	18,970	32,165	34,031	85,166
	1933		4,662,543	3,151,088	13,885,386	21,699,017	9,397	7,168	26,779	43,344
MALAYA§	1930					209,556†				47,000
	1931					210,219†				27,000
	1932					10,953,600				42,000
	1933					10,370,600				25,000
NORTH BORNEO† ...	1930					682,661				2,392
	1931					585,025				2,049
	1932					510,565				1,590
	1933					514,290				1,201
JAMAICA	1930		1,423,925	2,989,135	26,777,045	31,190,105	5,411	11,368	102,228	119,007
	1931		1,155,898	3,393,910	31,165,775	35,715,583	3,950	11,604	107,416	122,970
	1932		2,552,069	6,784,912	29,901,803	39,238,784	7,686	22,323	101,517	131,526
	1933		1,651,150	6,766,002	29,020,407	37,437,559	4,828	21,868	90,882	117,578
TRINIDAD AND TOBAGO ...	1930		1,497,070	2,149,372	2,239,685	5,886,127	5,844	8,706	11,280	25,830
	1931		2,022,935	1,739,620	725,320	4,487,875	4,923	5,604	2,022	12,549
	1932		958,550	1,817,595	1,071,100	3,847,245	2,260	6,102	4,460	12,822
	1933		3,102,710	2,286,280	2,499,990	7,888,980	7,352	7,350	6,704	21,406
WEST INDIES AND AMERICA TOTALS (including British Guiana, British Hon- duras, Leeward and Windward Islands).	1930		2,935,045	7,629,753	32,441,244	43,006,042	11,343	26,981	124,113	162,437
	1931		3,210,663	8,343,236	34,311,417	45,865,316	9,058	24,736	114,903	148,697
	1932		3,877,493	11,356,951	32,502,038	47,736,482	11,393	34,572	109,045	155,010
	1933		5,232,810	11,329,763	35,568,869	52,131,442	13,730	35,221	105,767	154,718
GRAND TOTALS (includ- ing Gold Coast, Nigeria, Sierra Leone, Mauritius, Seychelles, Fiji, Tonga and the New Hebrides).	1930	No.				65,488,283*				288,762*
		cwt.				210,156				
	1931	No.				69,112,425*				239,293*
		cwt.				212,419				
	1932	No.				83,727,374				287,497
		cwt.				2,180				
	1933	No.				85,971,159*				227,826*
		wt.				6,620				

* Includes exports for Ships' Stores.

† Particulars of destination not available.

‡ Quantities in cwt.

§ The quantities given are the net exports, i.e., the excess of total exports over imports. Values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XIX.
EXPORTS OF DESICCATED COCONUT AND COCONUT CAKE FROM CEYLON.

	Year.	Quantity in cwt. exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
Desiccated Coconut	1930	291,885	56,277	356,528	704,690	317,783	58,808	376,104	752,695
	1931	312,839	42,294	314,194	669,327	240,954	31,961	239,508	512,423
	1932	298,290	30,877	270,099	599,266	269,837	27,133	239,291	536,261
	1933	411,356	41,814	336,680	789,850	264,462	26,096	215,439	505,997
Coconut poonac	1930	—	650	278,228	278,878	—	78	93,985	94,063
	1931	6	468	370,163	370,637	2	156	101,319	101,477
	1932	4	12	433,691	433,707	1	4	132,420	132,425
	1933	—	8	509,018	509,026	—	2	112,201	112,203

TABLE XX.
EXPORTS OF COCONUT OIL FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
CEYLON	1930	cwt.	151,823	111,140	500,816	763,779	198,446	136,223	654,570	989,239
	1931	"	181,136	271,037	510,801	962,774	172,722	251,981	485,083	909,786
	1932	"	152,579	577,680	294,781	1,025,040	160,109	615,665	309,859	1,085,633
	1933	"	195,766	470,083	395,545	1,061,394	143,960	371,377	294,693	810,030
MALAYA†	1930	"				189,460				275,000
	1931	"				198,560				191,000
	1932	"				238,980				232,000
	1933	"				351,640				277,000
GRAND TOTALS (including Kenya and Uganda, Tanganyika Territory, Zanzibar, North Borneo, Mauritius, Seychelles, Palestine, British Guiana, Jamaica, Trinidad, St. Lucia and Fiji).	1930	{ gal. cwt.				73,581*				1,282,123*
	1931	{ gal. cwt.				957,872 44,735				1,110,536
	1932	{ gal. cwt.				1,165,641 58,602				1,331,109
	1933	{ gal. cwt.				1,269,349 111,651*				1,102,964*
						1,418,709				

* Includes exports for Ships' Stores.

† The quantities given are the net exports, i.e., the excess of total exports over imports. Values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XXI.
EXPORTS OF COPRA FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
TANGANYIKA TERRITORY ...	1930	—	5,613	1,782	7,395	—	78,607	31,126	109,733
	1931	—	5,757	1,477	7,234	—	48,062	14,147	62,209
	1932	287	5,992	986	7,265	3,055	51,547	10,092	64,694
	1933	90	6,257	1,810	8,157	707	47,963	13,490	62,160
ZANZIBAR	1930	22	16	12,760	12,798	450	289	240,257	240,996
	1931	69	9	11,691	11,769	1,048	95	148,534	149,677
	1932	69	27	11,708	11,804	827	295	142,385	143,507
	1933	—	79	12,165	12,244	—	671	104,600	105,271
EAST AFRICA—Totals (including Kenya and Uganda).	1930	22	5,650	14,678	20,350	450	79,222	273,943	353,615
	1931	69	5,882	13,168	19,119	1,048	49,198	162,681	212,927
	1932	356	6,070	12,694	19,120	3,882	52,366	152,477	208,725
	1933	90	6,350	14,024	20,464	707	48,763	118,485	167,955
WEST AFRICA—TOTALS (mostly Gold Coast).	1930	45	—	992	1,037	639	—	16,529	17,168
	1931	729	—	473	1,202	8,652	—	4,865	13,517
	1932	639	—	1,293	1,932	6,349	—	14,997	21,346
	1933	319	—	944	1,263	3,306	—	8,846	12,152
CEYLON	1930	533	70	90,027	90,630	6,661	1,072	1,344,421	1,352,154
	1931	432	1,125	92,308	93,865	4,340	12,320	936,984	953,644
	1932	301	14,376	31,022	45,699	3,328	236,484	381,510	621,322
	1933	100	23,794	40,445	64,339	669	194,393	317,071	512,133
MALAYA†	1930				102,014				1,629,000
	1931				100,568				1,025,000
	1932				97,277				1,100,000
	1933				110,298				909,000
DEPENDENCIES IN BORNEO*	1930				8,927				100,263
	1931				8,121				47,937
	1932				10,262				65,324
	1933				11,963				51,113
MAURITIUS	1930	1,043	643	20	1,706	12,102	8,638	287	21,027
	1931	2,468	10	40	2,518	28,931	262	465	29,658
	1932	1,719	—	—	1,719	21,564	—	—	21,564
	1933	1,175	8	—	1,183	15,005	100	—	15,105
SEYCHELLES	1930	1,105	2,704	2,101	5,910	15,015	46,123	29,290	90,428
	1931	3,393	709	773	4,875	33,844	7,894	8,201	49,939
	1932	1,569	2,832	279	4,680	18,383	37,379	3,473	59,235
	1933	2,312	905	—	3,217	20,026	10,598	—	30,624
JAMAICA	1930	1,457	—	3,088	4,545	24,652	—	47,432	72,084
	1931	847	—	2,675	3,522	9,172	—	29,466	38,638
	1932	2,609	—	274	2,883	30,876	—	2,832	33,708
	1933	2,031	—	257	2,288	19,335	1	2,623	21,969
TRINIDAD	1930	4,291	—	5,482	9,773	73,891	—	102,074	175,965
	1931	2,529	—	6,169	8,698	28,477	—	72,671	101,148
	1932	5,762	—	1,121	6,883	75,328	—	16,116	91,444
	1933	5,084	8	3,550	8,642	48,641	107	34,197	82,945
WEST INDIES AND AMERICA—TOTALS (including British Guiana, British Honduras and the Leeward and Windward Islands).	1930	7,703	756	10,040	18,499	130,068	10,795	162,466	303,329
	1931	5,011	686	9,829	15,526	57,821	6,606	114,472	178,899
	1932	9,892	810	1,848	12,550	128,427	9,121	21,845	159,393
	1933	9,034	858	4,188	14,080	86,619	8,039	39,396	134,054
FIJI	1930	4,982	295	18,605	23,882	80,180	4,831	284,513	369,524
	1931	5,356	—	11,561	16,917	55,832	—	121,954	177,786
	1932	10,149	2	4,925	15,076	113,387	22	56,831	170,240
	1933	7,545	205	14,847	22,597	64,275	2,251	129,262	195,788
BRITISH SOLOMON ISLANDS PROTECTORATE†.	1930-1	—	13,857	9,824	23,681	—	165,640	106,188	271,828
	1931-2	—	13,671	7,538	21,209	—	86,597	51,246	137,843
	1932-3	—	12,916	9,340	22,256	—	86,649	66,777	153,426
	1933-4	—	14,086	7,033	21,119	—	42,340	28,039	70,379

TABLE XXI—continued.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
GILBERT AND ELLICE ISLANDS COLONY.	1929-30*				5,465				83,691
	1930-1	—	1,442	5,105	6,547	—	14,420	51,052	65,472
	1931-2	—	—	6,715	6,715	—	—	67,150	67,150
	1932-3	—	6,945	2,050	8,995	—	78,175	16,667	94,842
TONGA†	1930	—	—	14,134	14,134	—	—	169,610	169,610
	1931	—	—	8,929	8,929	—	—	80,361	80,361
	1932	—	—	8,323	8,323	—	—	83,228	83,228
	1933	—	—	11,379	11,379	—	—	105,029	105,029
NEW HEBRIDES*	1930				11,883				130,573
	1931				10,005				69,886
	1932				7,032				36,306
	1933				7,045				23,864
WESTERN PACIFIC—TOTALS	1930	4,982	14,152	42,563	79,045	80,180	170,471	560,311	1,025,226
	1931	5,356	15,113	33,133	63,607	55,832	101,017	304,613	531,348
	1932	10,149	12,918	29,303	59,402	113,387	86,671	273,986	510,350
	1933	7,545	21,236	35,309	71,135	64,275	122,766	278,997	489,902
GRAND TOTALS	1930				328,118				4,692,210
	1931				309,401				3,042,869
	1932				252,641				2,767,259
	1933				297,942				2,322,038

* Particulars of destination not available.

† Exports to Europe (which may include United Kingdom) included under "Foreign Countries."

‡ The quantities given are the net exports, i.e., the excess of total exports over imports. Values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XXII.
EXPORTS OF COTTON SEED AND COTTON SEED CAKE AND MEAL
FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA ...	1930	29,190	2,993	1,600	33,783	119,544	11,972	6,746	138,262
	1931	44,364	—	1,071	45,435	145,477	—	3,747	149,224
	1932	46,137	4,070	6,274	56,481	137,888	12,207	18,804	168,899
	1933	81,377	—	—	81,377	262,848	—	—	262,848
EAST AFRICA—TOTALS (including Tanganyika Territory and Nyasaland).	1930	33,502	3,869	1,651	39,022	132,711	13,658	7,023	153,392
	1931	46,818	1,483	1,071	49,372	151,081	2,341	3,747	157,169
	1932	48,985	4,944	6,326	60,255	145,700	13,971	19,085	178,756
	1933	83,751	202	—	83,953	268,141	342	2	268,485
NIGERIA	1930	12,259	—	30	12,289	208,716	8	87	208,811
	1931	4,394	—	—	4,394	17,438	—	6	17,444
	1932	532	—	—	532	1,600	1	4	1,605
	1933	6,092	5	—	6,097	30,816	9	14	30,839
GRAND TOTALS (including Ceylon, Cyprus, Turks and Caicos Islands, Leeward and Windward Islands, Fiji and New Hebrides). (Cotton Seed)	1930				53,523				373,444
	1931				56,960				184,792
	1932				61,760				183,143
	1933				90,659				301,558
Cotton Seed Cake and Meal (from Tanganyika Territory, Barbados and the Leeward Islands).	1930	—	139	105	244	—	2,169	1,573	3,742
	1931	—	151	179	330	—	918	1,506	2,424
	1932	—	165	56	221	—	944	470	1,414
	1933	—	40	—	40	—	282	—	282
GRAND TOTALS Cotton Seed and Cotton Seed Cake and Meal.	1930				53,767				377,186
	1931				57,290				187,216
	1932				61,981				184,557
	1933				90,699				301,840

TABLE XXIII.
EXPORTS OF GROUNDNUTS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
TANGANYIKA TERRITORY ...	1930	—	1,290	16,043	17,333	—	12,319	174,248	186,567
	1931	47	1,698	1,325	3,070	449	15,274	12,983	28,706
	1932	8,982	1,848	5,043	15,873	103,861	17,739	60,410	182,010
	1933	6,791	3,494	8,892	19,177	60,530	27,046	78,647	166,223
EAST AFRICA—TOTALS (including Kenya and Uganda, Nyasaland and Northern Rhodesia). ...	1930		1,617	18,520	20,137	1	16,525	201,991	218,517
	1931	96	1,809	2,062	3,967	914	16,437	19,720	37,071
	1932	9,664	2,475	5,317	17,456	111,306	24,659	63,609	199,574
	1933	7,004	3,920	9,228	20,152	62,278	30,385	81,390	174,053
GAMBIA ...	1930	14,071	174	64,331	78,576	168,669	1,755	733,089	903,513
	1931	1,595	7	25,209	66,811	12,376	58	493,691	506,125
	1932	7,619	15	29,681	37,315	80,019	176	311,464	391,659
	1933	23,902	320	43,148	67,370	171,057	2,163	327,546	500,766
NIGERIA ...	1930	24,465	36	121,870	146,371	382,981	606	1,812,169	2,195,756
	1931	17,757	29	141,953	159,739	158,845	304	1,351,542	1,510,691
	1932	19,732	11	168,380	188,123	196,541	114	1,677,176	1,873,831
	1933	23,517	29	181,060	204,606	244,565	292	1,819,512	2,064,369
WEST AFRICA—TOTALS (including Gold Coast and Sierra Leone).	1930	38,536	210	186,237	224,983	551,650	2,361	2,545,712	3,099,723
	1931	19,352	36	207,163	226,551	171,221	362	1,845,249	2,016,832
	1932	27,351	26	198,062	225,439	276,560	290	1,988,645	2,265,495
	1933	47,419	349	224,210	271,978	415,622	2,455	2,147,085	2,565,162
GRAND TOTALS (including St. Vincent).	1930	38,536	1,951	204,762	245,249	551,651	22,346	2,747,853	3,321,850
	1931	19,448	1,922	209,225	230,595	172,135	17,876	1,864,982	2,054,993
	1932	37,015	2,529	203,379	242,923	387,866	25,347	2,052,254	2,465,467
	1933	54,423	4,290	233,438	292,151	477,900	33,131	2,228,476	2,739,507

TABLE XXIV.
EXPORTS OF PALM KERNELS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
GOLD COAST ...	1930	333	—	5,137	5,470	5,152	—	63,866	69,018
	1931	490	—	3,545	4,035	5,084	—	32,120	37,204
	1932	610	—	6,389	6,999	5,472	—	54,811	60,283
	1933	538	—	2,475	3,013	4,574	—	18,666	23,240
NIGERIA ...	1930	98,854	—	161,168	260,022	1,435,755	4	2,243,407	3,679,166
	1931	96,044	—	158,410	254,454	786,940	—	1,345,405	2,132,345
	1932	133,687	—	175,374	309,061	1,161,062	—	1,534,902	2,695,964
	1933	102,316	—	157,629	259,945	759,554	—	1,138,968	1,898,522
SIERRA LEONE ...	1930	17,713	—	38,928	56,641	210,202	—	454,389	664,591
	1931	12,676	—	41,786	54,462	107,018	—	342,724	449,742
	1932	24,690	—	52,472	77,162	220,658	—	466,819	687,477
	1933	28,202	—	35,881	64,083	216,853	—	255,971	472,824
WEST AFRICA—TOTALS (including Gambia).	1930	117,035	—	205,704	322,739	1,652,585	4	2,766,769	4,419,358
	1931	109,606	—	204,173	313,779	903,229	—	1,723,506	2,626,735
	1932	159,083	—	234,861	393,944	1,387,909	—	2,061,365	3,449,274
	1933	131,325	—	196,331	327,656	983,003	—	1,415,782	2,398,785
GRAND TOTALS (including Tanganyika Territory and Malaya).	1930	117,267	—	205,993	323,260	1,657,389	12	2,771,895	4,429,296
	1931	110,179	—	204,440	314,619	912,951	—	1,727,721	2,640,672
	1932	159,612	—	235,627	395,239	1,396,697	—	2,071,944	3,468,641
	1933	131,727	—	197,980	327,707	987,126	—	1,429,486	2,416,612

TABLE XXV.

EXPORTS OF PALM OIL FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
NIGERIA	1930	35,653	194	99,954	135,801	902,594	4,759	2,343,070	3,250,423
	1931	30,230	411	87,538	118,179	419,916	4,917	1,116,848	1,541,681
	1932	46,365	6	69,689	116,060	605,006	79	909,225	1,514,310
	1933	63,820	4,831	60,045	128,696	697,180	45,265	641,986	1,384,431
WEST AFRICA—TOTALS (including Gold Coast, Sierra Leone and Gambia).	1930	37,341	345	102,256	139,942	941,245	8,747	2,391,126	3,341,118
	1931	31,252	434	88,172	119,858	434,137	5,254	1,126,870	1,566,261
	1932	48,146	824	70,000	118,970	628,265	9,518	914,130	1,551,913
	1933	65,297	4,965	60,068	130,330	712,910	47,046	642,293	1,402,249
MALAYA	1930	1,964	79	1,210	3,253	62,225	2,666	40,549	105,440
	1931	2,373	94	2,197	4,664	60,963	2,487	56,370	119,820
	1932	3,528	414	3,963	7,905	60,513	7,228	65,189	132,930
	1933	3,506	3,121	5,754	12,381	40,558	44,672	78,002	163,232
GRAND TOTALS (including Kenya and Uganda and Tanganyika Territory).	1930	39,305	439	103,466	143,210	1,003,470	11,770	2,431,675	3,446,915
	1931	33,659	534	90,369	124,562	496,188	7,909	1,183,240	1,687,337
	1932	51,731	1,245	73,963	126,939	689,827	16,909	979,330	1,686,066
	1933	68,830	8,097	65,822	142,749	753,772	91,895	720,295	1,565,962

TABLE XXVI.

EXPORTS OF OTHER OIL SEEDS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA ... (Mainly Sesame).	1930	50	514	2,040	2,604	342	6,980	26,318	33,640
	1931	29	94	742	865	304	1,044	8,109	9,457
	1932	154	384	5,333	5,871	476	4,764	66,688	71,928
	1933	319	129	5,874	6,322	2,566	1,303	66,551	70,420
TANGANYIKA TERRITORY ... (Mainly Sesame).	1930	61	1,906	1,212	3,179	300	19,348	13,256	32,904
	1931	66	2,531	1,294	3,891	239	22,882	13,835	36,956
	1932	113	1,432	3,379	4,924	544	13,756	36,386	50,686
	1933	99	1,060	3,381	4,540	413	9,088	32,772	42,273
EAST AFRICA—TOTALS (including Nyasaland and Zanzibar).	1930	111	2,420	3,254	5,785	642	26,328	39,602	66,572
	1931	95	2,625	2,036	4,756	543	23,926	21,944	46,413
	1932	267	1,816	8,712	10,795	1,020	18,520	103,074	122,614
	1933	418	1,192	9,255	10,865	2,979	10,421	99,323	112,723
WEST AFRICA — TOTALS (Mostly Benniseed from Nigeria).	1930	1,462	1	8,132	9,595	30,295	3,719	116,480	150,494
	1931	602	3	5,388	5,993	5,423	2,911	47,042	55,376
	1932	121	1	10,415	10,537	106	2,727	87,252	90,085
	1933	62	3	9,607	9,672	868	3,045	79,286	83,199
PALESTINE (Mostly Sesame).	1930			2,674	2,674	2	2	36,218	36,222
	1931		10	881	891	19	120	12,443	12,582
	1932	10		351	361	102	3	6,495	6,600
	1933	—	—	168	168	—	—	2,872	2,872
GRAND TOTALS (including Ceylon, Cyprus, Jamaica and New Hebrides).	1930				18,306				257,470
	1931				11,978				117,697
	1932				22,177				223,703
	1933				21,234				204,664

TABLE XXVII.
EXPORTS OF OTHER VEGETABLE OILS FROM THE COLONIAL EMPIRE
(i.e. other than Palm Oil, Coconut Oil and Essential Oils).

<i>Colony, etc.</i>	<i>Year.</i>		<i>Quantity exported to</i>			<i>Total.</i>	<i>Value in £ exported to</i>			<i>Total.</i>
			<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>		<i>United Kingdom.</i>	<i>Rest of Empire.</i>	<i>Foreign Countries.</i>	
KENYA AND UGANDA— (Mainly Sesame).	1930	gal.	—	37,993	941	38,934	—	6,785	187	6,972
	1931	"	101	21,648	220	21,967	50	3,057	32	3,139
	1932	"	—	33,431	986	34,417	—	4,484	138	4,622
	1933	"	2,493	41,045	897	44,443*	216	4,232	93	4,542*
PALESTINE (Olive—edible).	1930	cwt.	29	286	9,927	10,242	88	764	18,542	19,394
	1931	"	61	425	9,168	9,654	223	1,504	17,218	18,945
	1932	"	309	1,559	4,692	6,560	1,040	5,167	13,432	19,639
	1933	"	369	1,070	4,526	5,965	1,631	3,756	15,399	20,786
(Olive—unrefined) ...	1930	cwt.	—	—	—	—	—	—	—	—
	1931	"	—	—	6,076	6,076	—	—	10,282	10,282
	1932	"	—	293	7,216	7,509	—	648	12,127	12,775
	1933	"	—	—	—	—	—	—	—	—
(Sunflower)	1930	cwt.	—	—	1,825	1,825	—	—	3,211	3,211
	1931	"	—	—	2,169	2,169	—	—	3,447	3,447
	1932	"	—	—	16,036	16,036	—	—	29,353	29,353
	1933	"	—	—	305	305	—	—	612	612
(Other)	1930	cwt.	—	1	934	935	—	3	2,134	2,137
	1931	"	—	4	3,129	3,133	—	12	5,144	5,156
	1932	"	—	3	77	80	—	7	158	165
	1933	"	—	—	67	67	—	—	125	125
GRAND TOTALS—(includ- ing Tanganyika Territory, Zanzibar, Gold Coast, Ni- geria, Sierra Leone, Ceylon, Sarawak, Cyprus and the Leeward Islands).	1930	gal.				57,574				37,208*
		cwt.				14,575*				
	1931	gal.				37,072				45,304
		cwt.				22,549				
	1932	gal.				38,973				71,539
		cwt.				32,038				
	1933	gal.				44,443*				36,235*
		cwt.				8,607				

* Includes exports for Ships' Stores.

TABLE XXVIII.

EXPORTS OF RAW RUBBER FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
EAST AFRICA—TOTALS (including Kenya and Uganda, Tanganyika Territory and Nyasaland)	1930	327		2	329	18,539	2	109	18,650
	1931	60		—	60	2,291	13	—	2,304
	1932	—		—	—	—	2	—	2
	1933	48		—	48	568	2	—	570
NIGERIA	1930	1,085	—	1,092	2,177	95,592	—	54,734	150,326
	1931	1,029	—	792	1,821	41,159	—	30,160	71,319
	1932	653	—	192	845	27,537	—	3,825	31,362
	1933	781	—	226	1,007	27,835	—	5,254	33,089
WEST AFRICA—TOTALS (including Gold Coast and Sierra Leone)	1930	1,269	—	1,155	2,424	113,165	—	60,191	173,356
	1931	1,094	—	830	1,924	45,023	—	31,546	76,569
	1932	656	—	203	859	27,611	—	4,140	31,751
	1933	785	—	248	1,033	27,902	1	5,996	33,899
CEYLON	1930	{ 364 17,449	{ 750 1,484	{ 6,000 57,382	{ 7,114* 76,315	790,838	75,668	2,671,238	3,537,744
	1931	{ 255 10,105	{ 720 1,775	{ 556 49,729	{ 1,531* 61,609				
	1932	{ 6,619 8,616	{ 2,690 1,244	{ 40,352 53,676	{ 49,661 63,536				
	1933	{ 8,616 1,244	{ 53,676 1,244	{ 63,536 1,244	{ 63,536 1,244				
MALAYA† (Para Rubber)	1930				440,000				22,160,000
	1931				420,100				11,091,000
	1932				400,500				7,527,000
	1933				434,600				10,449,000
(Para Rubber latex) ...	1930	159,805	4,615	651,066	815,486*	18,162	571	81,689	100,422
	1931	217,984	6,168	517,211	741,363*	15,012	427	31,563	47,002
	1932	436,454	31,104	1,289,444	1,757,002*	23,592	2,579	75,730	100,901
	1933	936	102	4,927	5,965	31,916	3,661	168,225	203,802
(Other)	1930	101	1	1,261	1,363	7,041	70	75,892	83,003
	1931	64	2	265	331	1,560	45	6,473	8,078
	1932	575	49	1,472	2,096	10,260	1,403	28,126	39,789
	1933	1,322	182	3,926	5,430	39,130	6,066	113,233	158,429
DEPENDENCIES IN BORNEO†	1930				18,619				894,373
	1931				17,373				401,324
	1932				13,091				205,510
	1933				19,943				464,438
GRAND TOTALS—(in- cluding British Guiana, Trinidad and Fiji)	1930	{ gal. tons			{ 822,600 539,060				26,914,976
	1931	{ gal. tons			{ 742,894 501,400				13,114,561
	1932	{ gal. tons			{ 1,757,002 466,207				8,898,504
	1933	{ gal. tons			{ — 530,555				13,034,835

* Quantity in gallons.

† Particulars of destination not available.

‡ The quantities given in the case of Malaya are the net exports, i.e., the excess of total exports over imports. In the case of Para Rubber, allowance has been made for moisture and impurities in imported rubber when calculating net exports. The values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XXIX.

EXPORTS OF SPICES AND CONDIMENTS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in cwt. exported to			Total.	Value in £ exported to			Total.	
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.		
ZANZIBAR ... (Cloves).	1930	13,291	72,180	60,260	145,731	64,177	366,485	291,116	721,778	
	1931	11,380	67,978	137,380	216,738	34,933	240,157	458,707	733,797	
	1932	14,054	68,210	79,790	162,054	40,558	207,015	239,822	487,395	
	1933	25,725	77,537	112,063	215,325	57,839	183,064	255,362	496,265	
	(Clove Stems) ...	1930	6,751	4,551	18,300	29,602	6,143	1,280	16,265	23,688
	1931	24,501	2,076	24,783	51,360	15,852	1,247	17,168	34,267	
	1932	15,419	1,699	22,125	39,243	7,642	802	11,103	19,547	
	1933	17,170	1,820	34,616	53,606	6,371	705	12,745	19,821	
	(Other) ...	1930	1,210	157	429	1,796	1,477	136	330	1,943
	1931	207	22	84	313	361	12	77	450	
	1932	107	—	342	449	135	—	187	322	
	1933	43	—	619	662	62	—	233	295	
EAST AFRICA—TOTALS (including Kenya and Uganda, Tanganyika Territory and Nyasaland).	1930	21,423	77,411	81,670	180,504	72,313	368,849	314,456	755,618	
	1931	36,512	70,455	164,413	271,380	51,993	241,981	480,231	774,205	
	1932	29,747	70,750	103,726	204,224*	48,623	209,377	253,401	511,403*	
	1933	44,109	80,078	149,041	273,228	65,929	184,588	270,838	521,355	
SIERRA LEONE ... (Mostly Ginger).	1930	23,313	2,747	15,591	41,651	31,871	4,552	25,226	61,649	
	1931	13,056	663	25,068	38,787	11,126	749	21,195	33,070	
	1932	14,581	1,289	13,111	28,981	12,334	1,331	11,374	25,039	
	1933	14,624	932	16,732	32,288	8,053	673	9,304	18,030	
WEST AFRICA—TOTALS ...	1930	25,284	2,919	15,660	43,863	34,555	4,943	25,465	64,963	
	1931	13,056	714	25,138	38,908	11,381	965	21,275	33,621	
	1932	14,581	1,328	13,112	29,021	12,600	1,626	11,377	25,603	
	1933	14,829	1,075	16,746	32,650	9,840	989	9,429	20,258	
CEYLON ... (Cardamoms) ...	1930	578	97	2,126	2,801	6,845	1,262	25,931	34,044*	
	1931	486	220	2,006	2,712	5,023	2,235	20,829	28,089*	
	1932	298	610	1,779	2,687	3,098	6,469	18,387	27,954	
	1933	242	464	2,455	3,161	1,895	3,843	19,619	25,357	
	(Cinnamon) ...	1930	4,009	3,015	37,125	44,149	6,950	3,333	123,214	133,498*
	1931	5,828	2,726	33,387	41,941	10,686	2,729	74,889	88,304	
	1932	3,520	3,766	40,981	48,267	3,880	2,114	68,473	74,467	
	1933	4,539	3,535	40,595	48,669	6,002	1,979	66,065	74,046	
	(Other, mainly pepper and nutmegs).	1930	585	3,275	1,295	5,160*	2,530	7,805	6,729	17,101*
	1931	338	3,587	1,468	5,394*	1,103	6,128	3,912	11,147*	
	1932	261	3,191	863	4,315	757	5,204	1,877	7,838	
	1933	560	1,701	700	2,961	1,093	2,444	846	4,383	
HONG KONG§ † ... (Ginger, preserved).	1930	Figures available only for the months of April to December.								
	1931					63,794	27,367	31,709	122,870	
	1932					49,498	33,490	28,536	111,524	
	1933					56,971	32,535	35,081	124,587	
MALAYA|| ... (All kinds).	1930				460				3,153	
	1931				1,620				6,634	
	1932				280				997	
	1933				260				714	
DEPENDENCIES IN BORNEO‡ (Almost all pepper from Sarawak).	1930				31,852				114,216	
	1931				48,908				135,747	
	1932				84,580				166,019	
	1933				65,289				129,185	
CYPRUS ... (Cumin).	1930	20	16	14,645	14,681	40	25	24,956	25,021	
	1931	—	6	8,680	8,686	—	6	11,900	11,906	
	1932	66	—	4,822	4,888	74	—	5,027	5,101	
	1933	—	1,489	4,388	5,877	—	1,862	6,479	8,341	

TABLE XXIX—continued.

Colony, etc.	Year.		Quantity in cwt. exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
MALTA (Cumin).	1930		50	20	6,350	6,420	150	46	15,254	15,450
	1931		—	40	6,571	6,611	—	91	12,201	12,292
	1932		140	382	6,117	6,639	182	554	7,061	7,797
	1933		100	—	5,128	5,228	229	—	7,528	7,757
JAMAICA (Pimento).	1930		1,591	3,220	80,214	85,025	3,600	7,294	181,608	192,502
	1931		2,115	3,899	103,045	109,059	2,108	3,886	102,674	108,666
	1932		3,151	3,840	66,918	73,909	2,771	2,981	55,935	61,687
	1933		5,378	3,470	72,413	81,262	4,827	3,028	61,956	69,811
(Ginger and small quantities of other spices).	1930		11,286	2,980	7,958	22,224	24,863	6,676	17,818	49,357
	1931		8,471	2,072	7,291	17,834	13,151	3,108	11,275	27,534
	1932		6,748	2,849	5,264	14,861	15,954	6,974	12,798	35,736
	1933		6,996	1,661	6,219	14,876	14,604	3,447	13,001	31,662
WINDWARD ISLANDS ... (Nutmegs).	1930		4,332	2,160	13,480	19,972	14,999	7,132	45,663	67,794
	1931		5,941	2,306	17,948	26,195	12,475	4,893	37,440	54,806
	1932		5,876	1,932	19,497	27,305	8,243	2,618	25,998	36,859
	1933		7,933	2,823	17,531	28,287	10,098	3,905	23,021	37,024
(Mace)	1930		2,662	134	771	3,567	30,918	1,282	9,195	41,395
	1931		2,799	145	714	3,658	22,498	1,191	5,175	28,864
	1932		3,280	134	767	4,181	17,956	601	4,533	23,090
	1933		3,645	198	573	4,416	19,018	859	2,599	22,476
WEST INDIES AND AMERICA— TOTALS (including Bahamas, Leeward Islands, Trinidad and Tobago and other spices from the Windward Islands).	1930	bush.	—	—	124	124	75,900	23,871	256,841	356,612
		cwt.	20,243	8,849	102,593	131,685				
	1931	bush.	—	4	45	49				
		cwt.	19,544	8,780	129,047	157,371				
	1932	bush.	—	116	29	145	45,341	14,328	99,712	159,361
		cwt.	19,260	9,278	92,480	121,018				
	1933	bush.	—	30	—	30	49,042	11,855	100,748	161,645
		cwt.	24,177	8,509	96,813	129,499				
GRAND TOTALS (including Mauritius, Seychelles and Fiji).	1930	bush.			124	124				1,521,627*
		cwt.			463,336*	463,336*				
	1931	bush.			49	49				1,446,677*
		cwt.			584,342*	584,342*				
	1932	bush.			145	145				1,098,699*
		cwt.			507,884*	507,884*				
	1933	bush.			30	30				1,078,157
		cwt.			568,151	568,151				

* Includes exports for Ships' Stores.

† Dollars converted to sterling at the annual average rate of exchange.

‡ Particulars of destination not available.

§ Quantity figures not available.

|| The quantities given in the case of Malaya, are the net exports, i.e., the excess of total exports over imports. The values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XXX.

EXPORTS OF RAW SUGAR FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in tons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA† ...	1930	—	1,094	33	1,127	—	27,968	814	28,783*
	1931	—	3,303	36	3,339	—	70,701	858	71,559
	1932	—	2,794	60	2,854	—	61,575	1,311	62,891*
	1933	8,124	3,183	36	11,343	131,201	63,908	652	195,765*
EAST AFRICA—TOTALS (including Tanganyika Territory)	1930	—	1,115	33	1,148	—	28,321	817	29,139*
	1931	—	3,407	37	3,444	—	72,402	867	73,269
	1932	—	2,840	61	2,901	—	62,069	1,323	63,397*
	1933	8,124	3,211	37	11,372	131,201	64,230	665	196,100*
MAURITIUS	1930	141,439	41,042	89	182,570	1,402,417	460,046	1,007	1,863,470
	1931	153,462	22,450	35	175,947	1,462,632	204,376	241	1,667,249
	1932	194,716	—	3	194,719	1,978,876	—	38	1,978,914
	1933	222,274	749	2	223,025	2,302,637	8,212	24	2,310,873
BARBADOS	1930	2,353	47,950	90	50,393	23,553	447,775	924	472,252
	1931	1,326	32,948	148	34,422	13,297	345,857	1,485	360,639
	1932	31,793	42,554	363	74,710	313,237	415,947	3,764	732,948
	1933	43,739	35,137	118	78,994	433,540	353,508	1,135	788,183
BRITISH GUIANA	1930	28,365	86,401	10	114,776	286,375	845,663	143	1,132,181
	1931	38,862	80,276	208	119,346	366,510	735,235	2,038	1,103,783
	1932	77,266	59,786	22	137,078*	777,123	557,817	224	1,335,236*
	1933	91,054	36,012	13	127,083*	856,340	340,287	204	1,196,907*
JAMAICA	1930	6,719	43,655	—	50,374	78,959	512,847	—	591,806
	1931	5,880	38,414	—	44,294	49,074	329,429	—	378,503
	1932	8,966	29,520	—	38,488*	79,339	263,556	—	342,909*
	1933	28,013	17,256	1	45,270	260,369	163,922	4	424,295
LEEWARD ISLANDS—Antigua and St. Kitts-Nevis	1930	8,600	25,779	8	34,387	85,390	266,867	112	352,369
	1931	2,000	12,274	6	14,280	20,025	125,988	97	146,110
	1932	27,284	10,462	9	37,775	258,078	105,095	103	363,276
	1933	35,110	10,142	6	45,258	354,954	102,652	63	457,669
TRINIDAD AND TOBAGO ...	1930	28,881	40,244	14	69,139	361,171	414,786	210	776,167
	1931	24,982	60,122	16	85,120	308,387	584,198	252	892,837
	1932	50,143	34,614	7	84,764	521,914	308,757	105	830,776
	1933	88,708	18,803	5	108,516	945,162	170,335	70	1,115,567
WINDWARD ISLANDS—St. Lucia and St. Vincent	1930	3,948	1,439	—	5,387	39,053	15,445	—	54,498
	1931	346	4,127	—	4,473	2,738	37,916	2	40,656
	1932	3,291	1,899	—	5,190	30,525	17,841	—	48,366
	1933	4,841	949	—	5,790	45,406	9,249	—	54,655
WEST INDIES AND AMERICA—TOTALS	1930	78,866	245,468	122	324,456	874,501	2,503,383	1,389	3,379,273
	1931	73,396	228,161	378	301,935	760,031	2,158,623	3,874	2,922,528
	1932	198,743	178,855	401	378,005*	1,980,216	1,669,013	4,196	3,653,511*
	1933	292,465	118,299	143	410,911*	2,895,771	1,139,953	1,476	4,037,276*
FIJI	1930	39,430	51,554	5	90,989	344,449	509,340	44	853,833
	1931	7,122	60,812	2	67,937*	53,413	570,868	18	624,310*
	1932	70,984	60,316	2	131,302	707,276	581,949	14	1,289,239
	1933	63,763	50,069	4	113,836	656,619	524,113	50	1,180,782
GRAND TOTALS—(including Ceylon)	1930	259,735	339,179	249	599,163	2,621,367	3,501,096	3,257	6,125,721*
	1931	233,980	314,830	452	549,263*	2,276,077	3,006,269	5,000	5,287,357*
	1932	464,443	242,011	467	706,927*	4,666,368	2,313,035	5,572	6,985,066*
	1933	594,750	175,539	223	770,516*	6,117,430	1,800,741	2,880	7,921,135*

* Includes exports for Ships' Stores.

† Mainly sugar produced and refined locally.

TABLE XXXI.

EXPORTS OF MOLASSES AND SYRUP FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in gallons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
BARBADOS	1930	472,118	6,848,997	1,764,192	9,085,307	3,934	239,411	62,275	305,620
	1931	256,679	5,569,865	1,963,907	7,790,451	4,821	311,141	110,111	426,073
	1932	398,279	6,584,632	1,468,167	8,451,078	5,025	338,713	79,437	423,175
	1933	958,400	7,412,455	632,419	9,003,274	3,770	399,248	33,794	436,812
BRITISH GUIANA ...	1930	3,725,225	47,494	78,618	3,851,337	38,603	906	1,621	41,130
	1931	4,301,494	550,949	2,254,554	7,106,997	44,575	7,836	24,136	76,547
	1932	5,849,558	1,039,951	665,011	7,554,520	60,617	11,984	7,771	80,372
	1933	5,405,853	2,636,376	95,004	8,137,233	56,311	29,493	2,051	87,855
WEST INDIES AND AMERICA—TOTALS (including Jamaica, Trinidad, Leewards & Windward Islands)	1930	5,063,601	7,146,492	2,016,137	14,226,230	54,347	245,873	69,763	369,983
	1931	5,985,781	6,816,201	4,571,102	17,373,084	63,465	329,826	141,521	534,812
	1932	9,141,563	8,828,604	2,199,309	20,169,476	90,011	361,951	89,648	541,611*
	1933	8,773,585	12,019,023	856,544	21,649,152	80,602	452,205	40,904	573,711
GRAND TOTALS—(including Tanganyika Territory and Fiji)	1930	—	12,356	2	12,358	—	—	—	—
	1931	—	9,035	1	9,036	—	—	—	—
	1932	—	9,460	—	9,460	—	—	—	—
	1933	—	12,937	—	12,937	—	—	—	—
	1930	5,063,605	7,147,469	2,016,137	14,227,211	54,348	258,626	69,796	382,770
	1931	5,985,781	6,816,201	4,571,102	17,373,084	63,465	339,052	141,530	544,047
	1932	9,141,563	8,828,604	2,199,309	20,169,476	90,011	371,627	89,651	551,290*
	1933	8,773,585	12,019,023	856,544	21,649,152	80,602	465,142	40,904	586,648

* Includes exports for Ships' Stores.

TABLE XXXII.

EXPORTS OF RUM FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in gallons exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
BRITISH GUIANA	1930	539,150	159,513	147,656	846,319	55,095	10,856	9,354	75,306
	1931	470,116	99,230	152,730	722,076	53,482	6,916	9,995	70,393
	1932	410,670	78,956	155,724	645,511*	43,035	5,469	10,839	59,432*
	1933	506,273	106,664	269,870	883,019*	55,762	6,925	17,105	79,846*
JAMAICA	1930	561,966	62,188	54,214	679,210*	74,669	8,051	7,158	89,878*
	1931	323,813	54,567	30,117	409,132*	32,381	5,458	3,011	40,850*
	1932	102,097	34,980	43,613	181,469*	12,212	4,185	5,031	21,519*
	1933	290,820	34,269	60,783	387,065*	35,835	4,381	8,057	48,425*
TRINIDAD AND TOBAGO ...	1930	71,661	310	38	72,063*	14,049	193	28	14,313*
	1931	86,054	44	42	86,260*	15,557	29	30	15,719*
	1932	139,330	96	20	139,540*	27,351	72	17	27,521*
	1933	61,335	1,746	596	63,907*	10,916	1,295	443	12,853*
GRAND TOTALS—(including Mauritius, Barbados, British Honduras, Leewards and Windward Islands (St. Lucia and St. Vincent)	1930	1,202,044	287,690	202,387	1,694,797*	146,972	27,364	16,618	191,299*
	1931	892,910	222,724	184,098	1,302,362*	102,616	20,845	13,269	137,072*
	1932	660,949	185,450	200,533	1,050,262*	83,539	18,907	16,115	119,042*
	1933	881,895	212,075	331,448	1,429,248*	105,049	21,946	25,629	153,242*

* Includes exports for Ships' Stores.

TABLE XXXIII.

EXPORTS OF TEA FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in lb. exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA	1930	37,408	124,096	112	161,616	1,692	6,579	6	8,277
	1931	54,544	298,928	3,136	356,608	2,628	14,144	153	16,925
	1932	436,800	270,928	4,704	713,328*	18,050	11,520	221	29,829*
	1933	2,774,439	912,575	53,172	3,740,746*	57,647	19,240	1,105	78,022*
NYASALAND PROTECTORATE.	1930	1,909,463	22,088	8,205	1,939,756	55,652	644	247	56,543
	1931	1,901,765	53,864	7,823	1,963,452	47,753	1,199	177	49,129
	1932	2,413,309	148,241	12,321	2,573,871	40,222	2,471	205	42,898
	1933	3,098,593	116,068	61,816	3,276,477	56,243	2,338	1,075	59,656
EAST AFRICA—TOTALS (including Tanga- nyika Territory and Northern Rhodesia).	1930	1,946,871	146,373	8,317	2,101,561	57,344	7,237	253	64,834
	1931	1,956,309	352,947	10,959	2,320,215	50,381	15,359	330	66,070
	1932	2,854,365	419,281	17,025	3,291,567*	58,592	13,996	426	73,052*
	1933	5,873,144	1,028,643	114,988	7,017,335*	113,901	21,578	2,181	137,690*
CEYLON	1930	153,875,770	54,037,593	35,152,685	243,152,274*	8,636,630	3,041,629	1,970,677	13,653,781*
	1931	160,509,450	47,851,660	35,538,549	243,969,970*	6,824,903	2,051,165	1,523,157	10,402,404*
	1932	172,222,457	46,583,343	33,950,942	252,823,755*	5,519,742	1,467,733	1,087,228	8,076,911*
	1933	149,494,689	40,020,363	26,500,891	216,060,773*	6,107,434	1,643,377	1,090,546	8,843,233*
GRAND TOTALS ...	1930	155,822,641	54,183,966	35,161,002	245,253,835*	8,693,974	3,048,866	1,970,930	13,718,615*
	1931	162,465,759	48,204,607	35,549,508	246,290,185*	6,875,284	2,066,524	1,523,487	10,468,474*
	1932	175,076,822	47,002,624	33,967,967	256,115,322*	5,578,334	1,481,729	1,087,654	8,149,963*
	1933	155,367,833	41,049,006	26,615,879	223,078,108*	6,221,335	1,664,955	1,092,727	8,980,923*

* Includes exports for Ships' Stores.

TABLE XXXIV.

EXPORTS OF TIMBER AND WOOD FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
KENYA AND UGANDA ... (Cedar). (Mangrove poles) ... (Other) ...	1930	cub. feet	21,106	4,327	10,237	35,670	5,757	1,438	3,813	11,006
	1931	"	5,794	4,984	3,983	14,761	1,551	1,453	1,261	4,265
	1932	"	36,241	3,617	5,068	44,926	9,153	928	1,341	11,422
	1933	"	38,125	4,038	3,864	46,027	10,452	1,010	1,018	12,480
	1930	No.	—	95,415	183,257	278,672	—	781	3,738	4,519
	1931	"	—	22,297	172,939	195,236	—	158	2,595	2,753
	1932	"	—	12,109	41,033	54,342*	—	85	405	496*
	1933	"	—	27,713	182,338	214,391*	—	126	1,904	2,075*
	1930	cub. feet	910	46,319	1,933	49,162	346	11,076	382	11,804
	1931	"	4,049	26,188	2,583	32,820	838	4,193	462	5,493
	1932	"	13,778	21,439	1,553	36,920*	3,159	3,273	269	6,711*
	1933	"	11,899	22,761	3,135	37,945*	2,975	3,654	550	7,201*
	1930	cub. feet	1,874	1,550	9,224	12,648	399	220	2,238	2,857
	1931	"	7,166	—	1,908	9,074	1,199	—	313	1,512
	1932	"	848	—	—	848	150	—	—	150
	1933	"	3,798	—	—	3,798	1,815	—	—	1,815
TANGANYIKA TERRITORY ... (Cedar) ... (Mangrove poles) ... (Other) ...	1930	No.	—	93,791	—	93,791	—	4,694	—	4,694
	1931	"	—	81,504	5,440	86,944	—	4,091	174	4,265
	1932†	"	—	—	—	—	—	2,005	81	2,086
	1933†	"	—	—	—	—	—	825	215	1,040
	1930	cub. feet	184	42,648	15,008	57,840	44	5,046	2,474	7,564
	1931	"	525	10,394	15,895	26,814	63	4,955	2,246	7,264
	1932	"	1,285	5,831	6,871	13,987	114	2,415	852	3,381
	1933	"	2,575	9,736	4,275	16,586	524	4,297	687	5,506
	1930	cub. feet	—	19,198	33	19,231	—	3,877	7	3,884
	1931	"	28	17,583	—	17,611	7	4,020	—	4,027
	1932	"	—	50,728	—	50,728	—	9,622	—	9,622
	1933	"	10	75,487	—	75,497	4	11,622	—	11,626
	1930						6,546	27,133	12,682	46,361
	1931						3,658	18,879	7,069	29,606
	1932						12,576	18,328	2,978	33,896*
	1933						15,770	21,539	4,742	42,116*
GOLD COAST ... (Mahogany). NIGERIA ... (Mahogany). (Other) ...	1930	cub. feet	429,250	30	426,252	855,532	53,682	5	37,267	90,954
	1931	"	162,659	—	463,170	625,829	20,032	—	41,226	61,258
	1932	"	228,743	—	31,174	259,917	30,136	—	2,549	32,685
	1933	"	160,761	—	49,141	209,902	20,667	—	4,603	25,270
	1930	cub. feet	556,883	21	115,029	671,933	89,323	8	20,726	110,057
	1931	"	360,726	—	121,027	481,753	57,375	—	18,978	76,353
	1932	"	499,252	—	125,824	625,076	51,042	—	11,094	62,136
	1933	"	508,907	—	227,391	736,298	39,974	—	18,470	58,444
	1930	tons	3,273	223	9,415	12,911	22,854	1,651	60,768	85,273
	1931	"	5,022	207	4,566	9,795	25,089	588	26,145	51,822
	1932	"	8,477	16	6,148	14,641	25,281	52	19,091	44,424
	1933	"	9,620	53	9,736	19,409	23,450	200	21,046	44,696
	1930						168,604	1,804	125,333	295,741
	1931						103,760	608	86,421	190,789
	1932						111,154	52	32,743	143,949
	1933						89,075	200	44,184	133,459
WEST AFRICA—TOTALS (including Gambia, Sierra Leone and minor woods from the Gold Coast). CEYLON ... MALAYA‡ ... DEPENDENCIES IN BORNEO††	1930	tons	185	2,161	879	3,225	4,238	7,136	12,198	23,572
	1931	"	93	2,104	575	2,772	1,669	9,439	7,020	18,128
	1932	"	661	917	925	2,503	1,839	4,342	3,483	9,664
	1933	"	121	1,019	1,073	2,213	2,018	2,899	4,433	9,350
	1930	cub. tons				21,399				78,924
	1931	of 50 cub. feet				16,932				50,944
	1932					17,499				48,325
	1933					22,339				59,300
	1930									386,963
	1931									426,010
	1932									371,300
	1933									280,567

EXPORTS OF TIMBER AND WOOD FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
BAHAMAS	1930	tons	59	—	10	69	242	32	5,206	5,480
		m. feet	—	4	268	272				
	1931	tons	29	—	—	29	110	89	9,928	10,127
		m. feet	—	15	1,995	2,010				
	1932	tons	51	—	—	51	261	19,473	7,326	27,060
		m. feet	—	3,266	2,200	5,466				
BRITISH GUIANA ... (Greenheart, Lumber).	1930	tons	130	—	—	130	605	18,845	3,879	23,329
		m. feet	—	3,369	978	4,347				
	1931	sup. feet	11,448	153,333	8,014	172,795	266	3,195	179	3,640
		"	3,924	169,162	62,917	236,003				
	1932	"	—	108,855	2,263	111,118	—	1,840	32	1,872
		"	—	98,286	29,180	127,466				
(Greenheart, Timber) ...	1930	cub. feet	50,540	28,097	97,330	175,967	8,300	4,305	15,793	28,398
		"	31,387	16,259	145,949	193,595				
	1931	"	29,093	78,784	69,632	177,489	4,879	9,681	10,409	24,969
		"	75,677	22,557	84,486	182,720				
	1932	"	—	—	—	—	—	—	—	—
		"	—	—	—	—				
(Other, Lumber)	1930	sup. feet	24	2,182	227	2,433	1	38	7	46
		"	—	4,928	5,495	10,423				
	1931	"	—	22,952	8,359	31,311	—	291	33	324
		"	—	31,293	4,324	35,617				
	1932	"	—	—	—	—	—	—	—	—
		"	—	—	—	—				
(Other, Timber)	1930	cub. feet	4,984	137	118	5,239	489	32	22	543
		"	86	440	113	639				
	1931	"	198	550	—	748	21	61	—	82
		"	622	1,147	—	1,769				
	1932	"	—	—	—	—	—	—	—	—
		"	—	—	—	—				
BRITISH HONDURAS ... (Mahogany).	1930	sup. feet	680,554	48,562	10,245,611	10,974,727	17,437	1,641	182,372	201,450
		"	818,619	14,607	2,551,273	3,384,499				
	1931	"	177,695	37,007	655,194	869,896	4,674	974	11,036	16,684
		"	637,812	2,577	—	640,389				
	1932	"	—	—	—	—	—	—	—	—
		"	—	—	—	—				
(Other)	1930	tons	192	—	95	287	1,189	4	6,140	7,323
		sup. ft.	10,017	178	375,277	385,472				
	1931	tons	216	—	52	268	1,283	—	3,342	4,625
		sup. ft.	12,324	—	214,541	226,865				
	1932	tons	103	—	—	103	469	81	718	1,268
		sup. ft.	7,183	3,017	113,656	123,856				
JAMAICA (Logwood).	1930	tons	162	—	10	172	1,210	—	666	1,876
		sup. ft.	63,350	—	127,004	190,354				
	1931	tons	268	—	15,972	16,240	778	—	46,565	47,343
		"	50	—	18,724	18,774				
	1932	"	743	—	18,515	19,258	2,074	—	53,156	55,230
		"	1,152	—	23,952	25,104				
(Other)	1930	tons	497	—	2,477	2,974	1,412	—	5,918	7,330
		"	613	112	3,102	3,827				
	1931	"	1,652	—	1,084	2,736	5,292	34	3,120	8,446
		"	1,781	1	4,442	6,224				
	1932	"	—	—	—	—	—	—	—	—
		"	—	—	—	—				
WEST INDIES AND AMERICA— TOTALS (including Turks and Caicos and Cayman Islands, Trinidad, Leeward and Windward Islands).	1930						30,207	11,093	266,564	307,864
	1931						25,660	7,352	132,924	165,936
	1932						17,688	34,078	86,078	137,842
	1933						32,066	25,746	94,740	152,552
WESTERN PACIFIC TOTALS (including Fiji, British Solomon Islands Protec- torate and the New Hebrides).	1930	tons†	—	872,197	5,327	877,524	—	5,311	45	7,334
		sup. ft.	—	—	—	24				
	1931	tons†	—	1,099,927	510	1,100,437	—	4,969	8	5,469
		sup. ft.	—	—	—	69				
	1932	tons†	150	1,204,241	77	1,204,468	3	5,908	5	7,062
		sup. ft.	—	—	—	61				
GRAND TOTALS	1930									1,146,759
	1931									886,882
	1932									752,040
	1933									681,354

* Includes exports for Ships' Stores.

† Particulars of destination not available.

‡ Quantity figures not available.

§ The quantities given in the case of Malaya are the net exports, i.e., the excess of total exports over imports. The values are approximate and are based on the assumption that the average value of domestic exports and re-exports was identical.

TABLE XXXV.

EXPORTS OF UNMANUFACTURED TOBACCO FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.	Quantity in lb. exported to			Total.	Value in £ exported to			Total.
		United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
NORTHERN RHODESIA ...	1930	518,298	777,686	—	1,295,984	20,068	37,095	—	57,163
	1931	329,225	550,187	—	879,412	13,012	20,334	—	33,346
	1932	744,471	326,374	—	1,070,845	27,290	11,919	—	39,209
	1933	423,547	540,608	—	964,155	16,193	19,003	—	35,196
NYASALAND ...	1930	12,934,786	—	128	12,934,914	484,733	—	5	484,738
	1931	10,687,404	—	3,177	10,690,581	400,778	—	119	400,897
	1932	15,081,842	—	193	15,082,035	565,569	—	7	565,576
	1933	10,383,976	5,997	4,525	10,394,498	389,399	225	170	389,794
EAST AFRICA—TOTALS—(including Kenya and Uganda, Tanganyika Territory and Zanzibar)	1930	13,584,451	914,405	123,062	14,621,918	510,726	40,367	2,584	553,677
	1931	11,144,281	848,750	52,936	12,045,967	418,647	25,756	1,152	443,555
	1932	15,956,351	460,005	53,285	16,469,641	599,117	14,097	841	614,055
	1933	10,974,624	984,093	41,073	11,999,790	412,641	29,833	555	443,029
CEYLON ...	1930	19,508	1,274,182	448	1,294,138	1,131	31,538	25	32,694
	1931	9,212	2,575,268	—	2,584,480	466	102,867	—	103,333
	1932	10,901	1,611,028	—	1,621,929	368	74,212	—	74,580
	1933	14,933	2,150,607	—	2,165,540	750	72,583	—	73,333
NORTH BORNEO† ...	1930				720,978				73,842
	1931				691,770				64,065
	1932				736,810				75,889
	1933				724,082				73,587
CYPRUS ...	1930	328,944	—	60,704	389,648	19,383	—	4,296	23,679
	1931	252,672	—	4,256	256,928	14,493	—	96	14,589
	1932	248,416	—	17,920	266,336	7,684	—	330	8,014
	1933	369,936	—	—	369,936	12,407	—	—	12,407
GRAND TOTALS—(including Mauritius, Palestine, Jamaica, the Leeward Islands and Fiji)	1930				17,126,457				689,615
	1931				15,744,154				636,434
	1932				19,228,880				780,451
	1933				15,336,788				607,166

† Particulars of destination not available.

TABLE XXXVI.

EXPORTS OF CIGARS FROM THE COLONIAL EMPIRE.

Colony, etc.	Year.		Quantity in lb. exported to			Total.	Value in £ exported to			Total.
			United Kingdom.	Rest of Empire.	Foreign Countries.		United Kingdom.	Rest of Empire.	Foreign Countries.	
JAMAICA...	1930		6,964	17,318	44,908	69,190	5,988	11,641	27,150	44,779
	1931		5,671	15,100	43,848	64,619	5,106	9,732	20,509	35,347
	1932		5,903	9,813	31,809	47,525	5,783	6,416	17,222	29,421
	1933		6,213	8,430	25,219	39,862	5,586	5,218	12,341	23,145
GRAND TOTALS—(including Kenya and Uganda, Ceylon and the Leeward Islands).	1930	No. lb.	60,960	97,390	7,000	165,350	6,255	13,557	27,173	46,985
		lb.	6,964	25,479	44,908	77,351				
	1931	No. lb.	—	—	—	—	5,165	10,358	20,509	36,032
		lb.	5,864	21,367	43,848	71,079				
	1932	No. lb.	—	—	—	—	5,783	7,172	17,222	30,177
		lb.	5,903	18,589	31,809	56,301				
	1933	No. lb.	—	6,250	—	6,250	5,586	5,690	12,348	23,624
		lb.	6,213	14,876	25,319	46,408				

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INDEX II.

COMMODITIES.

Note.—In the present index a page reference is given to each of the memoranda in Part II.

In the case of other entries the reference is not to the page, but to the memorandum in which the name occurs, the following abbreviations being employed :—

<i>Memorandum.</i>	<i>Abbreviation.</i>	<i>Memorandum.</i>	<i>Abbreviation.</i>
Animals and Animal Products.	Animals	Minerals:	
Cereals, other than Rice ...	Cereals	I. Metals	Minerals I
Cocoa	—	II. Precious stones ...	Minerals II
Coffee	—	III. Petroleum, etc. ...	Minerals III
Cotton	—	IV. Miscellaneous ...	Minerals IV
Essential Oils	Ess. Oils	Oil seeds and nuts and vegetable oils.	Oils
Fibres, other than Cotton:		Rice	—
I. Soft fibres	Fibres I	Rubber	—
II. Hard fibres	Fibres II	Spices and Condiments ...	Spices
Fruits and Fruit Products.	Fruit	Sugar and Sugar Products	Sugar
Nuts used as Fruit ...	Fruit nuts	Tea	—
Gums and Resins:		Timber	—
I. True Gums	Gums I	Tobacco	—
II. Resins	Gums II	Vegetables and Tubers:	
III. Miscellaneous ...	Gums III	I. Tubers	Veg. I
Marine Products	Marine	II. Others	Veg. II
		Miscellaneous:	Misc.
		Dyeing materials	Misc. Dyes
		Tanning materials	Misc. Tans.

A.	
Abura	Timber
<i>Acacia</i> spp.	Gums I, Misc. Tans.
<i>Achras Sapota</i>	Gums III
<i>Agathis alba</i>	Gums II
<i>Agathis</i> spp.	Timber
<i>Agave</i> spp.	Fibres II
Alcohol, power	Sugar
Alder	Timber
Allspice	Spices
Almandine-pyrope	Minerals II
Almonds	Fruit nuts
<i>Alnus orientalis</i>	Timber
Aloe fibre	Fibres II
Amethyst	Minerals II
<i>Amyris balsamifera</i>	Timber
Andalusite	Minerals II
Animals and Animal Products.	p. 459
Apatite	Minerals II
Arabic, Gum	Gums I
<i>Arabica</i>	Coffee
Areca nut	Misc.
Arrowroot	Veg. I
Arsenic	Minerals IV
<i>Artocarpus integrifolia</i>	Timber
Asbestos	Minerals IV
Asphalt	Minerals III
Avocado pears	Fruit

B.	
Babai	Veg. I
Bacon	Animals
Bagasse	Sugar
<i>Baikiaea plurijuga</i>	Timber
<i>Balanocarpus Heimii</i>	Gums II, Timber
Balata	Gums III, Timber.
Balau	Timber
Bamboo	Timber
Bananas	Fruit
Barite	Minerals I

Barley	Cereals
Bauxite	Minerals I
Bay oil	Ess. Oils
Beans	Veg. II
Beans, Dolichos	Veg. II
Beans, French	Veg. II
Beans, Lima	Veg. II
Bêche de Mer	Marine
Beeswax	Misc.
Belian	Timber
Benniseed	Oils
<i>Berria ammonilla</i>	Timber
Beryl	Minerals II
Bird's egg yolk	Misc.
Bird's nests, Edible	Misc.
Bitters	Misc.
Bitterwood	Timber
Bitumen	Minerals III
Blachan	Marine
Bloodwood	Timber
Blue Mountain	Coffee
<i>Borassus flabellifer</i>	Timber
Bowstring hemp	Fibres II
Breadfruit	Veg. II
Bromine	Minerals IV
<i>Brya Ebenus</i>	Timber
Buckwheat	Cereals
Burghaus-shell	Marine
Butter	Animals

C.	
<i>Calophyllum antillanum</i>	Timber
Camphor, Borneo	Gums II
Camphorwood	Timber
Camwood	Misc. Dyes
Cane tops	Sugar
Cane trash	Sugar
<i>Canna Edulis</i>	Veg. I
<i>Cannabis sativa</i>	Fibres I
Cantala	Fibres II
Capsicums	Spices

Guano, whale	Marine
Guatcare	Timber
<i>Guaiacum</i> spp.	Timber
Guinea corn	Cereals
Gums and Resins:	
I. True Gums	p. 484
II. Resins	p. 485
III. Miscellaneous	p. 485
Gurjun	Timber
Gutta percha	Gums III
Gypsum	Minerals IV

H.

<i>Haematoxylon campechianum</i>	Timber
Hams	Animals
Hazel-nuts	Fruit Nuts
Hemp	Fibres I
Hemp, Bimlipatam or Deccan.	Fibres II
Hemp, Manila	Fibres II
Hemp, Mauritius	Fibres II
Hemp, New Zealand	Fibres II
Henequen	Fibres I
<i>Hevea brasiliensis</i>	Rubber
<i>Hibiscus cannabinus</i>	Fibres II
Hides and Skins	Animals
Holothurians	Marine
Honey	Misc.
<i>Hopea</i> spp.	Timber
Hora	Timber

I.

Illipe-nuts	Oils
Ilmenite	Minerals I
Indian corn	Cereals
Insecticides	Misc.
<i>Ipomaea Batatas</i>	Veg. I
Iroko	Timber
Iron ore	Minerals I
<i>Isoptera</i> spp.	Timber
Ivory	Misc.
Ivory-nut	Misc.

J.

Jak	Timber
Jelutong	Gums III
Jereton	Timber
<i>Juniperus procera</i>	Timber
Jute	Fibres I

K.

Kaffir corn	Cereals
Kaolin	Minerals IV
Kapok	Fibres II
Kapur	Gums II, Timber
Kauri	Timber
Kawai	Veg. I
Keruing	Timber
<i>Khaya</i> spp.	Timber
Kitul fibre	Fibres II
Kola-nuts	Misc.
Kumalas	Veg. I

L.

Laka	Timber
<i>Landolphia</i> spp.	Rubber
Latex, concentrated	Rubber
<i>Lauraceae</i> spp.	Timber
Laurier	Timber
Lead	Minerals I
<i>Lecythis laevifolia</i>	Timber
Lemons	Fruit

Lemon-grass	Ess. Oils
Lenabatu-grass	Ess. Oils
<i>Liberica</i>	Coffee
Lignite	Minerals III
Lignum Vitae	Timber
<i>Lilium: longiflorum</i>	Misc.
<i>Harrisii</i> (Easter lily).	
Limes	Fruit
Lime-juice	Fruit
Lime oil	Ess. Oils
Limestone	Minerals IV
Linseed	Oils
<i>Linum usitatissimum</i>	Fibres I
Locust beans	Misc.
Logwood	Timber, Misc. Dyes
<i>Lovoa Klaineana</i>	Timber

M.

Mace	Spices
Maguey	Fibres II
Mahogany	Timber
Maize	Cereals
Mandarins	Fruit
Manganese ore	Minerals I
Mangoes	Fruit
Mangrove	Timber
Mangrove bark	Misc. Tans.
<i>Manihot Glaziovii</i>	Rubber
<i>Manihot</i> spp.	Veg. I
Manila hemp	Fibres II
Manioc	Veg. I
Manjak	Minerals III
<i>Mansonia altissima</i>	Timber
<i>Maranta arundinacea</i>	Veg. I
Marble	Minerals IV
Marie Galante	Cotton
Marine Products	p. 486
Match wood	Timber
Mauritius beans	Veg. II
Mauritius hemp	Fibres II
Mawah oil	Ess. Oils
Mealies	Cereals
Megass	Sugar
Melons	Fruit
<i>Metroxylon</i> spp.	Veg. I
Mica	Minerals IV
Millet	Cereals
Millet, Bulrush	Cereals
Millet, Finger	Cereals
Millet, Foxtail	Cereals
Millet, Italian	Cereals
Millet, Pearl	Cereals
<i>Mimusops Balata</i>	Timber
<i>Mimusops globosa</i>	Gums III, Timber
<i>Mimusops hexandra</i>	Timber
Minerals	p. 491
I. Metals	p. 492
II. Precious Stones	p. 495
III. Petroleum, etc.	p. 496
IV. Miscellaneous	p. 497
Miscellaneous	p. 528
<i>Mitragyna stipulosa</i>	Timber
Molasses	Sugar
Molybdenite	Minerals I
Monazite	Minerals I
Monkey-nuts	Oils
Moonstone	Minerals II
Mora	Timber
<i>Mora excelsa</i>	Timber
Mules	Animals
Mupumena	Timber
<i>Musa textilis</i>	Fibres II
Mvule	Timber
<i>Myristica fragrans</i>	Spices
Myrrh	Gums

N.

<i>Nectandra Ocotea</i> ...	Timber
New Zealand hemp ...	Fibres II
Nickel ...	Minerals I
<i>Nicotiana</i> spp. ...	Tobacco
Nuts used as fruit ...	p. 476
Nutmegs ...	Spices

O.

Oak ...	Timber
Oats ...	Cereals
Obeche ...	Timber
<i>Ocimum</i> spp. ...	Ess. Oils
<i>Ocotea Rodioei</i> ...	Timber
<i>Ocotea usambarensis</i> ...	Timber
Oil Seeds and Nuts and Vegetable Oils.	p. 498
Oils, Essential ...	p. 470
Oil, seal ...	Marine
Oil, whale ...	Marine
Oil, palm ...	Oils
Okra ...	Veg. II
<i>Olea</i> spp. ...	Timber
Olive ...	Oils, Timber
Onions ...	Veg. II
Oranges ...	Fruit
<i>Oryza Sativa</i> ...	Rice
Oxen ...	Animals

P.

<i>Palaquium Gutta</i> ...	Gums III
Palm kernels ...	Oils
Palm oil ...	Oils
Palmarosa oil ...	Ess. Oils
Palu ...	Timber
Panna ...	Veg. I
Papaine ...	Fruit
Papaws ...	Fruit
<i>Parashorea</i> spp. ...	Timber
Patchouli oil ...	Ess. Oils
Peas ...	Veg. II
Peas, cow ...	Veg. II
Peas, pigeon ...	Veg. II
Peanuts ...	Oils
Pearls ...	Marine
Pearlshell ...	Marine
<i>Pelargonium</i> spp. ...	Ess. Oils
<i>Peltogyne</i> spp. ...	Timber
Pepper ...	Spices
Pepper, red ...	Spices
Peppermint oil ...	Ess. Oils
Petit grain oil ...	Ess. Oils
Petroleum ...	Minerals III
Phenakite ...	Minerals II
<i>Phormium tenax</i> ...	Fibres II
Phosphates ...	Minerals IV
Phosphatic guano ...	Minerals IV
Piassava ...	Fibres II
<i>Picraena excelsa</i> ...	Timber
<i>Pimenta acris</i> ...	Ess. Oils
<i>Pimenta officinalis</i> ...	Ess. Oils, Spices
Pimento ...	Spices
Pimento Berry oil ...	Ess. Oils
Pimento Leaf oil ...	Ess. Oils
Pine, Abaco ...	Timber
Pine, Aleppo ...	Timber
Pine, Troödos ...	Timber
Pineapples ...	Fruit
<i>Pinus</i> spp. ...	Timber
<i>Piper</i> spp. ...	Spices
Plane ...	Timber
Plantains ...	Fruit
<i>Platanus orientalis</i> ...	Timber
Platinum ...	Minerals I
Plumbago ...	Minerals IV

<i>Podocarpus</i> ...	Timber
<i>Pogostemon patchuli</i> ...	Ess. Oils
Pomegranates ...	Fruit
Potash ...	Minerals IV
Potatoes ...	Veg. I
Potatoes, sweet ...	Veg. I
Prawns, dried ...	Marine
Precious Stones ...	Minerals II
<i>Pterocarpus angolensis</i> ...	Timber
Pulse ...	Veg. II
Pumpkins ...	Veg. II
Purpleheart ...	Timber
Pyrethrum ...	Misc.
Pyrites ...	Minerals I
Pyrope ...	Minerals II

Q.

Quartz ...	Minerals II
<i>Quercus</i> spp. ...	Timber

R.

Raffia ...	Fibres II
Raisins ...	Fruit
Ramie grass ...	Fibres II
<i>Raphia</i> spp. ...	Fibres II
Rattan ...	Timber
Redwood, Zambesi ...	Timber
Resins ...	Gums II
Revertex ...	Rubber
Rhinoceros horn ...	Misc.
<i>Rhizophora</i> spp. ...	Timber, Misc. Tans
Rhun palm ...	Timber
<i>Rhus coriaria</i> ...	Misc. Tans.
Rice ...	p. 504
<i>Robusta</i> ...	Coffee
Rosewood ...	Timber
Rubber ...	p. 505
Ruby ...	Minerals II
Rum ...	Sugar
Rutile ...	Minerals II

S.

Sago ...	Veg. I
Salt ...	Minerals IV
Sama ...	Fibres II
Sandalwood ...	Timber
<i>Sansevieria</i> ...	Fibres II
<i>Santalum</i> spp. ...	Timber
<i>Sapotaceae</i> ...	Gums III
Sapphire ...	Minerals II
Satinwood ...	Timber
Scheelite ...	Minerals I
Sea Island ...	Cotton
Selangan batu ...	Timber
Seraya ...	Timber
Sesame ...	Oils
Shark skin ...	Marine
Shea-nuts ...	Oils
<i>Shorea</i> spp. ...	Timber
Silk ...	Misc.
Sillimanite ...	Minerals II
Silver ...	Minerals I
Sisal ...	Fibres II
Skins ...	Animals
Soapstone ...	Minerals IV
Sodium carbonate ...	Minerals IV
Sorghum ...	Cereals
Soya bean ...	Oils
Sphene ...	Minerals II
Spices and Condiments ...	p. 511
Spinel ...	Minerals II
Sponges ...	Marine
<i>Stenophylla</i> ...	Coffee
Sticklac ...	Gums II

Strophanthus	...	...	Misc.
Sugar and Sugar Products...			p. 514
Sulphur	...	...	Minerals IV
Sumach	...	...	Misc. Tans
Sunflower seed	...	...	Oils
Sunn hemp	...	...	Fibres I
Swietenia spp.	...	...	Timber

T.

Tallow	...	...	Animals
Tannias	...	...	Veg. I
Tanning Materials	...	...	Misc.
Tapioca	...	...	Veg. I
Taro	...	...	Veg. I
Tea	...	...	p. 517
Teak	...	...	Timber
Teak, African	...	...	Timber
Teak, Borneo	...	...	Timber
Teak, Island	...	...	Timber
Teak, Nigerian	...	...	Timber
Teak, Rhodesian	...	...	Timber
Terra umbra	...	...	Minerals IV
Terre verte	...	...	Minerals IV
Theobroma cacao	...	...	Cocoa
Thorium	...	...	Minerals I
Timber	...	...	p. 520
Tin	...	...	Minerals I
Titanium	...	...	Minerals I
Tobacco	...	...	p. 523
Tomatoes	...	...	Veg. II
Tombac	...	...	Tobacco
Topaz	...	...	Minerals II
Tortoiseshell	...	...	Marine
Tourmaline	...	...	Minerals II
Trincomalee wood	...	...	Timber
Triplochiton Nigericum	...	...	Timber
Triplochiton Scleroxylon	...	...	Timber
Trocas shell	...	...	Marine
Tuba	...	...	Misc.
Tung fruit	...	...	Oils
Tungsten	...	...	Minerals I
Turtles	...	...	Marine
Turtle meat	...	...	Marine
Turtle shell	...	...	Marine
Turtle skin	...	...	Marine

U.

Uncaria gambier	...	...	Misc. Tans.
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V.

Vanadium	...	...	Minerals I
Vanilla	...	...	Spices
Vegetables:			
I. Tubers	...	...	p. 526
II. Other	...	...	p. 527

W.

Wallaba	...	...	Timber
Walnut, African, Nigerian	...	...	Timber
or Benin.			
Wattle	...	...	Misc. Tans.
Whale products	...	...	Marine
Wheat	...	...	Cereals
Windowpane oysters	...	...	Marine
Wine	...	...	Misc.
Wolfram	...	...	Minerals I
Wool	...	...	Animals

X.

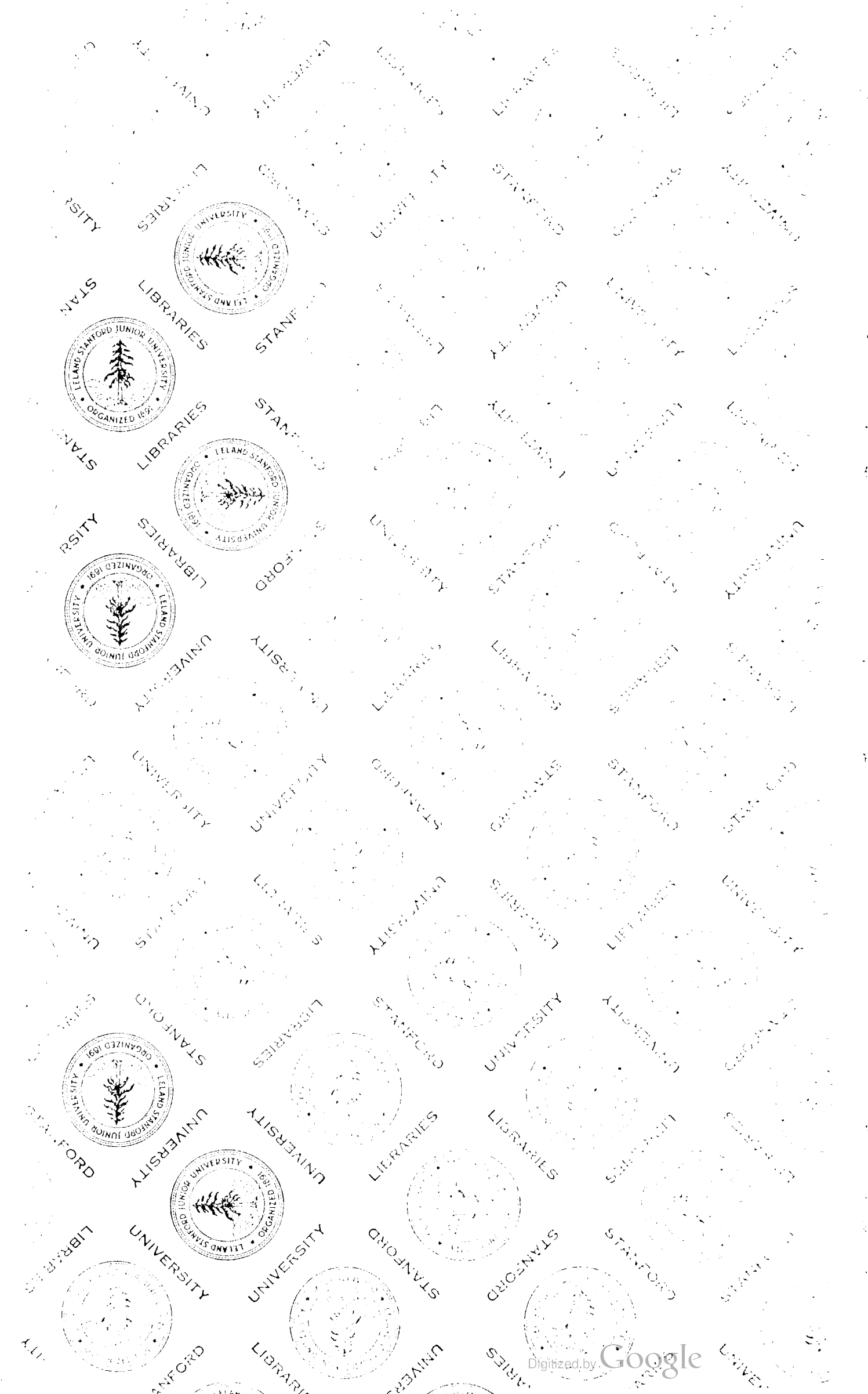
Xanthosoma sagittifolium...	...	...	Veg. I
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Y.

Yams	...	...	Veg. I
Ye'eb nuts	...	...	Fruit Nuts

Z.

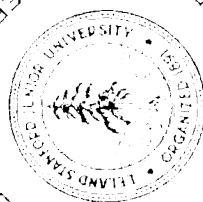
Zanthoxylum spp.	...	...	Timber
Zinc	...	...	Minerals I
Zingiber officinale	...	...	Spices
Zircon	...	...	Minerals II



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